

## *Welcome from our President*

Dear TFRW Leadership:

What a pleasure that you are here today taking part in TFRW's 11<sup>th</sup> Biennial Leadership Day. You will depart with added knowledge and information, as well as hearing numerous candidates who want your vote in the GOP Primary. Hopefully, this will assist you in being the best leader you can be for your club and in making an informed decision when you cast your vote.

Congratulations and a large thank you goes to Rachel Woods, current TFRW VP Programs, and previously Leadership Development Chairman, who planned this day, coordinated all of the presentations, and did much of the leg work in "getting it done." Her skillful and creative design of "Survival Skills" Leadership Day is to be commended.



Thank you to our Republican Party Chairman Steve Munisteri for his participation and to Harris County Judge Ed Emmett, Chairman of Victory 2012, for being our luncheon keynote speaker. They are two of my favorites! Their message of GOP unity is essential for our success in November, 2012.

You are deeply appreciated for your commitment to learning and making progress in our great cause – to restore our nation to sound government! Thank you for attending.

Remember to "Focus on the Outcome – Imagine Our Impact!" as we head full force into 2012!

Best wishes,

Carolyn Hodges  
TFRW President

## **A Very Special Thanks to our TFRW Leadership Day Presenters, Trainers & Support Team!**

**Capy Alexander  
Donna Barr  
Rebecca Bradford  
Maria Burbridge  
Kim Chambers  
Debra Coffey  
Cheri Creekmore  
Kimberly Curtis  
LaJean Curtis  
Toni Anne Dashiell  
Marilyn Davis  
Merri Easterly  
Cynthia England  
Mina Fitting  
Melinda Fredericks  
Belinda Frisk  
Linda Hancock  
Holly Hansen  
Ellen Harrison  
Carolyn Hodges  
Patti Johnson**

**Kathy Jones  
Theresa Kosmoski  
Rhonda Lacy  
Jennifer Lambert  
Claudia Lobell  
Alice Marshall  
Besa Martin  
Teresa Moore  
Julia Morton  
Jan Ott  
Judy Parada  
Caroline Pierce  
Helen Quiram  
Debbie Roan  
Jody Rushton  
Judy Smith  
Jeanette Sterner  
Judy Strzinek  
Joanna Stubbs  
Borah Van Dormolen  
Billie Jean Zinter**

***Rachel Woods, Chairman of Leadership Day 2012***



-----  
**Leadership Day Coffee Breaks Sponsored by:**  
**TEXANS FOR LAWSUIT REFORM**  
-----



**Leadership Day Trail Mix Compliments of:**  
**MCLENNAN COUNTY REPUBLICAN WOMEN**

**TFRW Leadership Survival Skills Camp**  
11th Biennial Club Leadership Day  
February 4, 2012

**AGENDA**

**7:30 A.M. REGISTRATION**

**8:00 A.M. OPENING SESSION (CAPITOL BALLROOM)**

- Welcome and Call to order - Carolyn Hodges, TFRW President
- Invocation - Rebecca Bradford, TFRW Immediate Past President
- Pledges to our Flags - Jan Ott, TFRW Secretary
- Message from TFRW President - Carolyn Hodges, TFRW President
- Rhonda Lacy, Citizen and Student Education Committee Chairman
- Introduction and Overview of the TFRW Handbook - Debra Coffey, TFRW 1st Vice President
- Meet Your District Directors & Deputy Presidents – Judy Strzinek, TFRW District Director Coordinator

**8:35 A.M. TEAM BUILDING SESSION (CAPITOL BALLROOM)**

- Introduction to Training Day and Team Building Session - Rachel Woods, TFRW Vice President of Programs & Chairman of Leadership Day 2012
- Team Building Game - Toni Anne Dashiell, TFRW Past President
- Hospitality Announcement - Patti Johnson, Hospitality Committee Co-Chair
- Getting Involved in the Convention Process: Becoming a Delegate – Rebecca Bradford, TFRW Immediate Past President
- Introduction of Steve Munisteri, Chairman of Republican Party of Texas – Carolyn Hodges, TFRW President
- Republican Party Unity - Steve Munisteri, Republican Party of Texas Chairman
- Instructions for Training Camps - Rachel Woods, TFRW Vice President of Programs, Chairman of Leadership Day 2012

**10:15 A.M. BREAK**

**10:30AM TRAINING CAMPS (SESSION 1)**

**Club President Camp –CAPITOL BALLROOM**

- Introduction and Overview - Carolyn Hodges, TFRW President
- Parliamentary Procedure –Theresa Kosmoski, TFRW Parliamentarian
- Bylaws—Cheri Creekmore, TFRW Vice President of Bylaws
- Awards—Marilyn Davis, TFRW Awards Chair

### **Club Activities Camp – CAPITOL VIEW TERRACE SOUTH**

- Introduction - Toni Anne Dashiell, TFRW Past President
- Fundraising-- Jody Rushton, TFRW Vice President of Finance
- Campaign Activities – Jeanette Sterner, TFRW Vice President of Campaign Activities
- Publicity Social Networking, Holly Hansen, TFRW Public Relations Chairman

### **Club Growth Camp - CAPITOL VIEW TERRACE NORTH**

- Introduction - Borah Van Dormolen, TFRW Past President
- Membership – Judy Parada, TFRW Vice President of Membership
- Outreach/Strategic Partnerships - Kim Chambers, TFRW Outreach Chairman
- Programs – Rachel Woods, TFRW Vice President of Programs

### **Club Finances Camp – CREEKSIDE (downstairs on the lower level)**

- Introduction - Rebecca Bradford, TFRW Immediate Past President
- Treasurer—Cynthia England, TFRW Treasurer
- PAC—Julia Morton TFRW PAC Treasurer
- Introduction to the TEC & Q&A -Ian Steusoff, Attorney, Texas Ethics Commission

### **11:20 A.M. BREAK**

### **11:30 A.M. TRAINING CAMPS (SESSION 2)**

### **Club President Camp –CAPITOL BALLROOM**

- Introduction and Overview - Carolyn Hodges, TFRW President
- Parliamentary Procedure –Theresa Kosmoski, TFRW Parliamentarian
- Bylaws—Cheri Creekmore, TFRW Vice President of Bylaws
- Awards—Marilyn Davis, TFRW Awards Chair

### **Club Activities Camp – CAPITOL VIEW TERRACE SOUTH**

- Introduction - Toni Anne Dashiell, TFRW Past President
- Fundraising-- Jody Rushton, TFRW Vice President of Finance
- Campaign Activities – Jeanette Sterner, TFRW Vice President of Campaign Activities
- Publicity Social Networking, Holly Hansen, TFRW Public Relations Chairman

### **Club Growth Camp - CAPITOL VIEW TERRACE NORTH**

- Introduction - Borah Van Dormolen, TFRW Past President
- Membership – Judy Parada, TFRW Vice President of Membership
- Outreach/Strategic Partnerships - Kim Chambers, TFRW Outreach Chairman
- Programs – Rachel Woods, TFRW Vice President of Programs



**Club Finances Camp – CREEKSIDE (downstairs on the lower level)**

- Introduction - Rebecca Bradford, TFRW Immediate Past President
- Treasurer—Cynthia England, TFRW Treasurer
- PAC—Julia Morton TFRW PAC Treasurer
- Introduction to the TEC & Q&A -Ian Steusoff, Attorney, Texas Ethics Commission

**12:20 P.M. BREAK**

**12:30 P.M. LUNCHEON (CAPITOL BALLROOM)**

- Welcome - Carolyn Hodges, TFRW President
- Invocation - Jan Ott, TFRW Secretary
- Introduction to the NFRW Regents Program - Caroline Pierce, TFRW Regents Chairman
- Melinda Fredricks, Vice Chairman of the Republican Party of Texas
- Introduction of Camp Song – Borah Van Dormolen, TFRW Past President
- Introduction to the TFRW Patrons Program, Merri Easterly and Judy Smith, TFRW Patrons Co-Chairman
- Introduction of Judge Ed Emmett, Harris County Judge, Victory 2012 Chairman - Carolyn Hodges, TFRW President
- Keynote Address - Judge Ed Emmett, Harris County Judge, Victory 2012 Chairman

**1:45 p.m. LEGISLATIVE SESSION (CAPITOL BALLROOM)**

- Introduction of Candidates - Besa Martin, TFRW Vice President of Legislation

**2:45 p.m. TRAINING SURVIVAL CELEBRATION (CAPITOL BALLROOM)**

- Closing Remarks - Carolyn Hodges, TFRW President
- Introduction of “Leadership Day” Volunteers & the Introduction of the “Leadership Shuffle” – Rachel Woods, TFRW Vice President of Programs & Chairman of Leadership Day 2012

**3:00 – 4:00 p.m. Candidate Meet & Greet (HOTEL FOYER)**



## **Thank You**

**to our sponsors for a great evening with  
Joanne King Herring and Karen Hughes**

---

**We appreciate the support of our Sponsors**

Virginia and Ed Gambrell – Gold

---

Hon. Susan Combs, Comptroller – Silver

Christi Craddick, Candidate for Railroad Commissioner – Silver

Toni Anne Dashiell – Silver

Carolyn Hodges – Silver

Lois Dickson Myers, Candidate for U.S. Congress, Dist. 36 – Silver

Wes Riddle, Candidate for US Congress, Dist. 25 – Silver

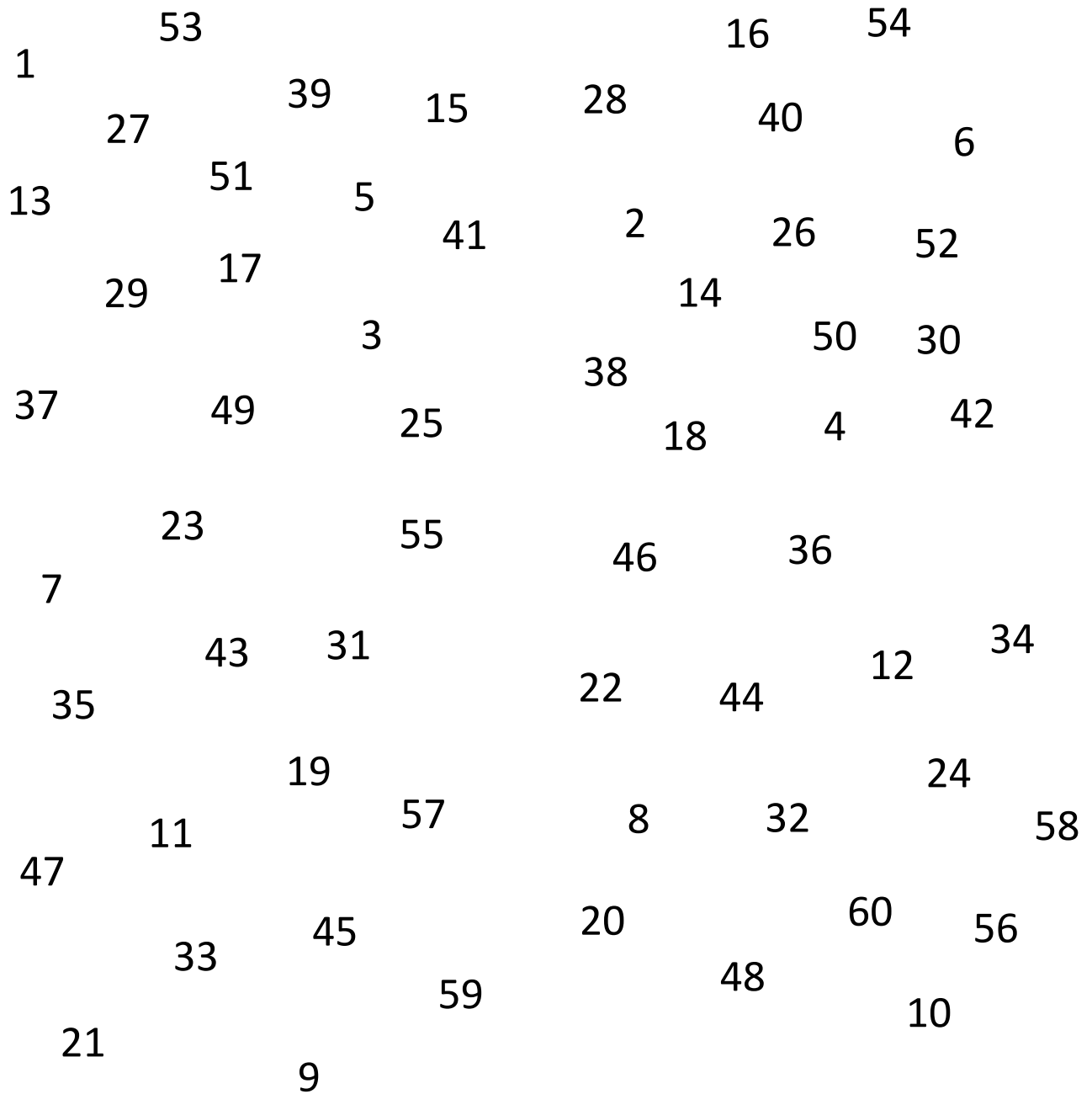
Railroad Commissioner Barry Smitherman – Silver

# We appreciate the support of our Patrons

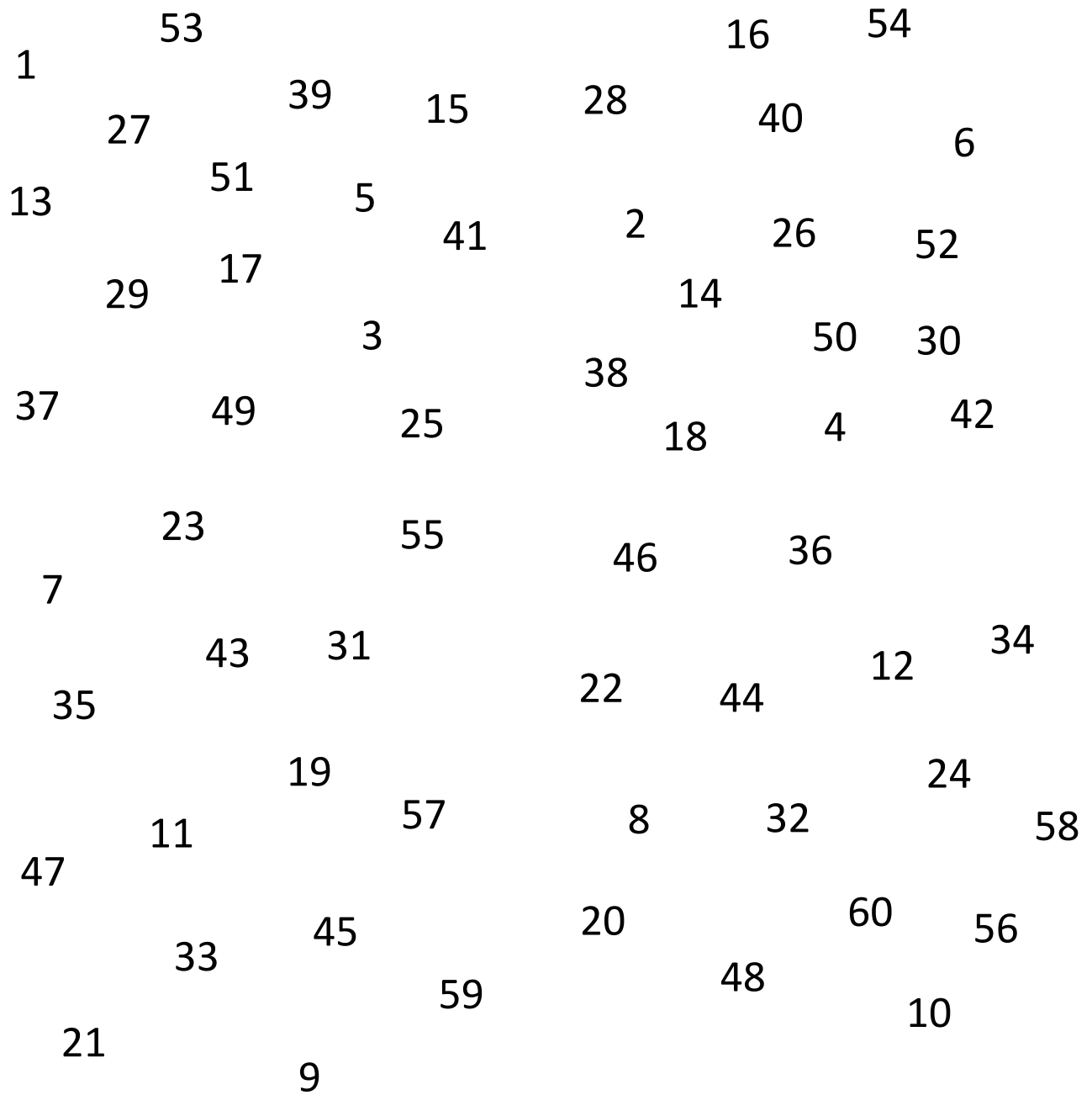
Rita Ashley	Sue Eubanks	Diane Louie	Yvonne Ramsey
Donna Barr	Billye Fietz	Pearl Maggio	Deborah Guitian Roan
Becky Berger	Mina Fitting	Marie Maggio	Beverly Roberts
Rebecca Bradford	Sandy Galvan	Sylvia Manley	Jody Rushton
Kathleen Brugger	Hilda Garza-DeShazo	Besa Martin	Jonell Sims
Barbara Buxton	Brenda Gill	Shirley Martinez	Diane Sloan
Betty Byrd	Taffy Goldsmith	Mary Mayo	Judy Smith
Jane Cansino	Deborah Guerriero	Debra McDaniels	Cynthia Smith
Elaine Cashion	Gina Halle	Amanda Montagne	Amy Spiess
Beth Cathey	Linda Hancock	Nancy Moore	Cindy Steller
Kim Chambers	Laura Hargis	Texas Moore	Jeanette Sterner
Cindy Clendenen	Hon. Patricia Harless	Julia Morton	Judy Strzinek
Margaret Ballenger Cluck	Debra Harper	Amy Mundy	Gail Suttle
	Ellen Harrison	Hon. Jane Nelson	Robyn Tepper
Debra Coffey	Helen Heavey	Jeannee O'Neill	Mopsie Thornborrow
Hon. Susan Combs	Jaye Hendon	Jan Ott	Mandy Tschoepe
Cheri Creekmore	Mollie Herrington	Sylvia Pogue Overton	Carol Van De Walle
Halene Crossman	Carolyn Hodges	Judy Parada	Borah Van Dormolen
Toni Anne Dashiell	Barbara Hogan	Rita Parrish	Lila Ward
Marilyn Davis	Buffie Ingersoll	Jan Patterson	Connie Williams
Pat Deis	Brigitte Izzo	Rena Peden	Tommie Worthy
Barbara Dorsey	Trish Jordan	Sherry Peterson	Freida Wright
Beryl Dowd	Irene Kerr	Dee Phelps	Ron Crossman- Associate
Sharon Draper	Jo Konen	Caroline Pierce	
Norma Duncan	Rhonda Lacy	Cheryl Plunkett	Arthur Galvan – Associate
Merri Easterly	Juandelle Lacy Roberts	Carol Prince	
Cynthia England	Vicki Leggett	Sally Pryor	Wes Moore – Associate

# TEAM BUILDING SESSION

## THE NUMBER GAME



## THE NUMBER GAME



# MY TEAM COMPASS

A Compass provides direction. It helps us reach our goal. It can also help us to get back on track when we are not headed the right direction. When you are leading a team effort, use this navigation tool to think of ideas for team action. If a team is not performing effectively, review this list for ideas for action.



- A Leader emerges to clarify the problem or goal
- Communication Increases
- If at first the team does not succeed, it tries again
- The team gets organized
- Team members share ideas
- A plan is adopted
- Ideas are tried or implemented
- Team members understand their specific roles and responsibilities
- Some learning occurs through trial and error when trying something new
- Team learns from going through the process
- The team solves the problem or reaches the goal
- The team assesses its effectiveness and adjusts for better results
- Team members are moved into the right roles if need be, based on strengths
- The team repeats the process to create a system
- The team seeks feedback and assesses in order to continually progress

(Note: This is not an exhaustive list, but is a common list used to describe a high performance team).

# PHASES OF TEAM DEVELOPMENT

**Phase 1: Forming: A Team is Created.** During this phase, there is typically excitement about a new project or undertaking. There is also uncertainty about the expectations of the team. Team members wonder what they will do. They will question a project's importance. How can a leader help a team move beyond this phase more efficiently?

- Clarify the task or goal
- Encourage team members to get to know each other
- Ensure that expectations are clarified
- Explain the specific roles and responsibilities of team members

**Phase 2: Storming: Obstacles Emerge.** Conflict is common during this phase. Team members often feel discouragement and frustration. Team members question whether the project is possible or whether the goal is attainable. During this phase, team members often become concerned that conflict or other barriers cannot be overcome. How can a leader help a team move beyond this phase more efficiently?

- Remind team this is a normal phase that the team will get through
- Seek to remove barriers to success
- Remind the team of the importance of the goal
- Discuss the importance of each role and team member to achieving success
- Ask team members to share their concerns


**Phase 3: Norming: Habits are Established.** Team begins to feel optimism about its ability to be successful and get the project done. Individuals begin to accept team members. Team members' questions turn from whether the goal is attainable to whether the team will be able to meet deadlines. Some team members may wonder if the problems from the "Storming" phase will re-emerge. How can a leader help a team move beyond this phase efficiently?

- Review and acknowledge progress
- Encourage sharing of information to avoid premature decisions
- Praise behaviors that are worth repeating
- Ensure accountability and follow-through for all members


**Phase 4: Performing: The Team Excels.** The team begins to have a sense of pride about their accomplishment. They gain confidence in their individual roles and as a group. Team members begin to think about the rewards that will come from their accomplishment. They begin to consider the future and anticipate their next challenge. What should a leader do when her team excels and reaches its goal?

- Provide recognition for results
- Assess team effectiveness and adjust for better results
- Expand goals to include new opportunities









## THE TRAIL TO SUCCESS for Republican Conventions!

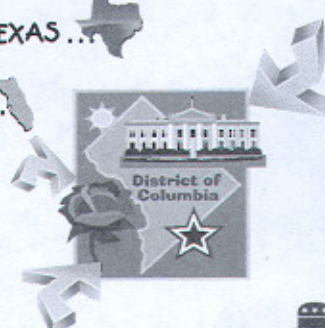





From YOUR County Convention  
To  
YOUR RPT Convention  
To  
YOUR Republican National Convention!




## THE TRAIL TO SUCCESS!

- LEADS FROM TEXAS ...
- TO FLORIDA ...
- STRAIGHT TO:

## THE TRAIL TO SUCCESS



- **WHO:** REPUBLICAN PRIMARY VOTERS
- **WHAT:** PARTICIPATION IN THE REPUBLICAN CONVENTION PROCESS
- **WHERE:** IN YOUR PRECINCT
  - IN YOUR STATE
  - IN YOUR NATION
- **WHEN:** 2012
- **WHY TFRW:** WE PARTICIPATE, WE EDUCATE, AND REPUBLICAN WOMEN CARE

## Republican Party of Texas Conventions

### 2012




BY: Toni Anne Dashiell - Kendall County Republican Chairman  
PRESENTED BY: Rebecca Bradford, TFRW Immediate Past President




## Conventions 2012

- ✓ **Precinct Convention**  
Tuesday April 3, after the election
- ✓ **Senatorial / County Convention**  
Saturday April 21
- ✓ **State Republican Convention**  
June 7 - 9, Ft Worth, TX
- ✓ **National Convention**  
August 27 to 31, Tampa, FL

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

## PURPOSE OF THE CONVENTIONS



### Purposes of the Conventions

- ✓ **Choose delegates and alternates to the next higher convention level, when applicable**
- ✓ **Consider resolutions or statements on policy issues to send to the next higher convention and/or for inclusion in the state or national GOP platform**

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

### Delegates & Alternates

- ✓ Delegates are elected at a convention to represent the body electing them at the next higher convention level
- ✓ Alternates are elected to serve in the event that a delegate cannot or does not serve
- ✓ In order to be elected a delegate or alternate to a convention:
  - ✓ Must be a registered voter in the represented area
  - ✓ Have voted in most recent Republican primary election

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

### Resolutions

- ✓ A resolution is a formal statement or expression of an opinion put before or adopted by an assembly
- ✓ Resolutions are offered by delegates for discussion and may address any topic
- ✓ Resolutions passed by delegates at a convention are sent to the next convention level for consideration
- ✓ Resolutions may eventually become part of the Party's platform

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

## PRECINCT CONVENTION



### Precinct Convention

- ✓ To participate, you must have voted in Republican primary (voter card stamped to verify voting)
- ✓ Delegates for the County/Senatorial Convention are selected and voted upon
- ✓ Platform resolutions may be presented in writing and voted upon

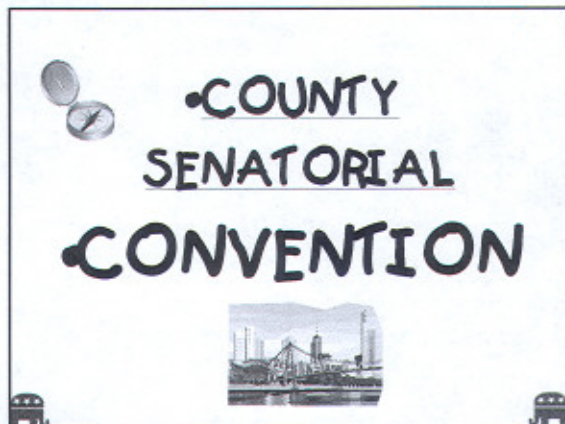
[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

### Precinct Convention

- ✓ There is no quorum requirement
  - ✓ One person can hold a convention
- ✓ Required paperwork provided must be returned to the County Republican Party headquarters or County Chairman by the date stipulated in the packet or it will not be valid
- ✓ Precinct Convention may last a few minutes to an hour or more

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)





### County Convention

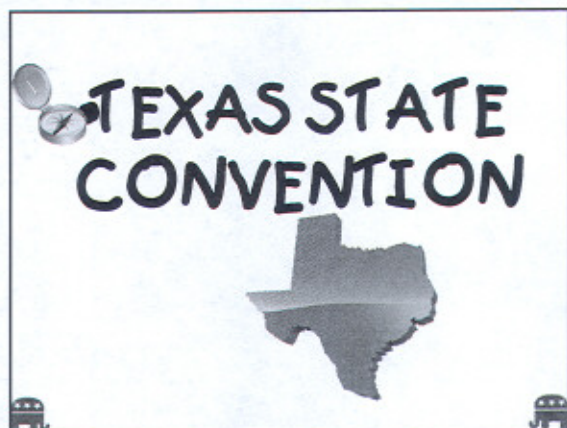
- ✓ Saturday April 21, 2012
- ✓ Delegates are chosen at the Precinct Conventions
- ✓ Precinct delegates may be asked to serve on Temporary Committees:
  - ✓ Credentials
  - ✓ Rules
  - ✓ Organization
  - ✓ Resolutions
  - ✓ Nominations
  - ✓ These meetings should precede the Convention
- ✓ Permanent committee members are elected by the whole body of the convention

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

### County Convention

- ✓ Delegates to State Convention in Fort Worth will be selected by the Nominations Committee and presented to whole body of the Convention for vote
- ✓ Resolutions Committee will present resolutions to the whole body for a vote

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)



### State Republican Convention

- ✓ June 7 - 9, Ft Worth, TX
- ✓ State Convention delegates will meet twice in caucuses made up of only those from each of the state's thirty-one senate districts. Delegates there will elect a permanent caucus chairman, elect one man and one woman to represent them on the State Republican Executive Committee, and elect one person to each of the following committees: Credentials, Organization, Nominations, Platform & Resolutions, and Rules.

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

### State Republican Convention

- ✓ June 7 - 9, Ft Worth, TX
- ✓ Senatorial Districts will caucus the first day of Convention to elect 1 man and 1 woman to serve on State Republican Executive Committee
- ✓ The State Convention shall elect a State Chairman and Vice Chair
- ✓ Congressional Districts will caucus the second day to elect 3 delegates and 3 alternates to attend national convention

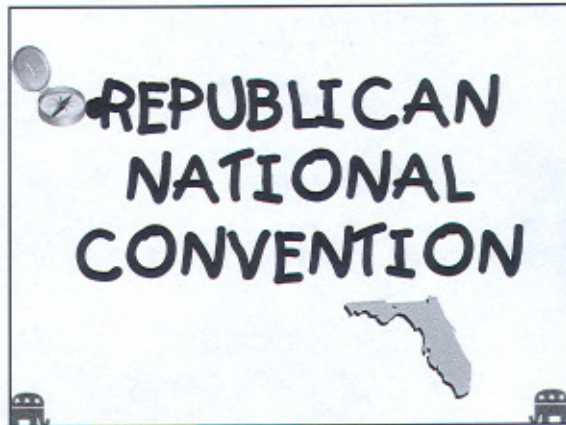
[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)



## State Republican Convention

- ✓ June 7 - 9, Ft Worth, TX
- ✓ A National Committeeman and National Committeewoman will be elected to represent Texas on the RNC
- ✓ Each Congressional caucus will elect an Elector and a person to serve on the Nominations Committee
  - ✓ This committee will select At Large delegates and alternates to attend National Convention
- ✓ A state platform will be voted on by the whole body of the convention

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)



## National Convention

- ✓ August 27 - 31, 2012, Orlando, FL
- ✓ Held prior to Presidential Election
- ✓ Delegates will elect 1 man and 1 woman to serve on each temporary committee for the National Convention
- ✓ National platform is voted upon
- ✓ President/Vice President nominee is elected

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

## Conventions 2012

- ✓ **Precinct Convention**  
Tuesday April 3, after the election
- ✓ **Senatorial / County Convention**  
Saturday April 21
- ✓ **State Republican Convention**  
June 7 - 9, Ft Worth, TX
- ✓ **National Convention**  
August 27 to 31, Tampa, FL

[www.texasgop.org/about-the-party](http://www.texasgop.org/about-the-party)

## • TFRW MEMBERS • HAVE THE SURVIVAL SKILLS!



- YOU ARE PARTICIPATING IN THE REPUBLICAN POLITICAL PROCESS,
- YOU ARE POLITICALLY EDUCATED,
- AND YOU CARE!



## LEADERSHIP SURVIVAL SKILLS CAMP

### • CONTACT INFORMATION FOR CONVENTIONS:

- YOUR Precinct Chairman
- YOUR County Republican Chairman
- [www.texasgop.org](http://www.texasgop.org)
- [www.gopconvention2012.com](http://www.gopconvention2012.com)
- [www.gop.com](http://www.gop.com)







Texas Federation of Republican Women

# **CLUB PRESIDENT** **Camp**

- Surviving the Presidency
- Parliamentary Procedure
- Bylaws
- Awards



# “SURVIVING” THE PRESIDENCY

(THE SKILLS TO MAKE IT HAPPEN  
AND THE ABILITY TO LIVE TO TELL ABOUT IT)

Carolyn Hodges, TFRW President, 2012-2013

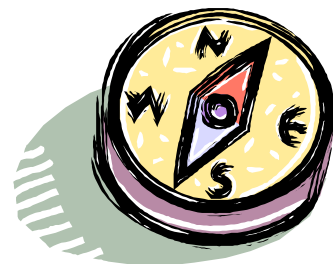


We all know that for **basic survival**, humans must have **water, food, and shelter**, the ability to “**think clearly**” and to **get help** if needed. Just as humans must survive, we as presidents must survive by having the “basics” in place.

- I. **Water— the most essential element.** The **most essential element for you** and your club on which its life depends is **HOW you lead.**
  - A. Selecting your board — match abilities and interests to the position.
  - B. Work together in a collaborative, team-like approach for the greatest productivity.
  - C. Be respectful of others’ opinions while remaining positive and doing so with a smile.
  - D. Conduct a good meeting (well organized) and you will grow.
  - E. Show appreciation for jobs well done.
  - F. Listen and you will learn.
- II. **Food: Feeding the mind and soul of your club.** A club should always be **learning and progressing.**
  - A. Work with your Program Chair to be sure that your programs are relevant. We are political in nature so your programs should follow suit.
  - B. Engage in great communication devices so that all can see what a fine organization you are: newsletter, website, email blasts. We are now in the 21<sup>st</sup> Century, so your club should be as well.
  - C. Take part in your community as projects present themselves: Veterans, Education, Citizenship, Patriotism. Let your community know about your club and its goals.
  - D. Establish committees that reflect the size and demographics of your club. Have committees that fit with you and your area of the state; do not feel that you must have all of the TFRW Committees.
  - E. What you do, do well — quality over quantity!
- III. **Shelter: Make sure that the **physical needs** of your club are met.**
  - A. Where are you meeting? Do you have the key to enter?
  - B. Make sure that your club has a good working arrangement with the place you meet — restaurant, library, club facility, or government facility.
  - C. Be sure a club member will handle all of the necessities — reservations, collection of money, av equipment in place, microphone, flags and flag placement.
  - D. Don’t forget your gavel!

- IV. The ability to “**think clearly**”: **tools for making your life easier** as President.
- A. Have a well-planned agenda. **If possible** email the agenda in advance along with financials so that all will have prior to the meeting. Otherwise, they can be distributed on meeting day.
  - B. Appoint a parliamentarian who should be seated next to you; will provide a good comfort zone for you. She will consult *Robert’s Rules of Order* on any needed meeting procedures.
  - C. *Robert’s Rules of Order*: This is good information for you to review and use as a reference.
  - D. Know your bylaws and standing rules and work within them. This will keep your club strong and successful.
  - E. Use appropriate disclaimers on all printed materials, emails sent from your club. When federal candidates/office holders are present, federal disclaimers must be printed and displayed.
  - F. Be familiar with the goals and purposes of TFRW (see *Leadership Handbook*).
  - G. Use your gavel wisely.
  - H. Remember you are the current “caretaker” of the club; it is about “we” and “us” rather than “me” and “I.”
- V. **Getting help** if needed: There is plenty of it available!
- A. *TFRW Leadership Handbook* — an amazing resource for you, especially the sections titled “Local Club Job Descriptions” and “Tips” — how to conduct meetings, prepare agendas, protocol, flag protocol, sample bylaws, etc.
  - B. NFRW website, [www.nfrw.org](http://www.nfrw.org) and TFRW website, [www.tfrw.org](http://www.tfrw.org)
  - C. *TFRW President’s Newsletter* — each month (hard copy/odd and e-version/even)
  - D. TFRW Roster — in *Leadership Handbook*
  - E. Quarterly Conference Calls, Email blasts from TFRW
  - F. Use the TFRW Monthly Planner to build an award-winning club.

Remember, as you survive, enjoy the ride and have fun. That’s important! But most of all, “Focus on the Outcome — Imagine Our Impact!” We have much to do this year and we can make such an impact; be sure that you are doing all that you can do!





# Congratulations! You are your club's Secretary!

## *"What are my responsibilities?"*

Your job is very important because you record and file the official record of your club's meetings and business.

### What do I do at the meeting?

- Present the minutes of the previous meeting for approval. Often, a copy of the previous minutes is included in the newsletter or sent out by email. In this case, they don't have to be actually read at the meeting unless a member insists. Normally corrections are made without objection, but if there is a dispute there can be debate and a vote on the proposed correction. Only after the minutes of a meeting are approved in this way do they become the official record of what happened.
- During officers' reports, when it comes time for the Secretary's Report, read to the group any letters or correspondence received.
- Record the minutes. Remember, the minutes that you take should contain a record of what was *done* at the meeting, not what was *said* by the members. The minutes should never reflect personal opinions, comments, or anecdotes.

### What do I need to record from the meeting?

The minutes contain three parts.

1. The first paragraph of the minutes should include:
  - ✓ kind of meeting - e.g. regular or special
  - ✓ name of club
  - ✓ date, time, and place (unless always the same)
  - ✓ presence of president and secretary or names of their substitutes
  - ✓ whether minutes of previous meetings were read and approved, or "approved as corrected". The corrections themselves should be made in the minutes being corrected, and not further described in the minutes of the meeting at which they are corrected.





2. Body of the minutes: Start a separate paragraph for each subject matter. Never include the secretary's opinion on anything said or done (for example, do not write, "x gave an excellent report on...") The name and subject of a guest speaker or other program may be given, but no summary of the talk. Frequently, secretaries make unneeded work for themselves by putting far more into the minutes than is required or appropriate. Do not try to summarize the reports offered and arguments made in debate or include all of the amendments and other secondary motions.
  - ✓ Record Main Motions Only: All main motions which are moved during the course of a meeting (excepting only those which are withdrawn by the maker) should be recorded in the minutes and whether they were adopted or defeated "after debate", or "after amendment". The name of the mover - but not the seconder - should be given. The text should be recorded using the exact wording of the motion immediately before it was finally voted on or otherwise disposed of. (incorporating any amendments that were adopted). They should include the text of main motions as they stood when finally voted on.
  - ✓ You should not hesitate to ask the chair to have a motion repeated, or to ask the chair to exercise his or her authority to require that a main motion, an amendment, or instruction to a committee be put in writing.
  - ✓ Other things to include: Votes - usually, only that a motion was adopted or lost. If a count or ballot votes was ordered include the number of votes on each side. For a roll call votes , the names of those voting on each side.
3. Last paragraph: Give the time of adjournment but you need not list the mover or fact of adoption of any motion to Adjourn. The minutes are signed by the secretary. No need to include "Respectfully submitted."

You can learn more in [Robert's Rules of Order](#) or feel free to ask me.

*Jan Ott*

*TFRW Secretary*

*Email: [JanOtt-TFRW@wcthou.com](mailto:JanOtt-TFRW@wcthou.com)*

## **Parliamentary Basics: Presiding**

Two essential components of effectively presiding over a meeting are preparing and following an agenda, and handling motions fairly and consistently.

### **Sample Meeting Agenda**

(Excerpted from the NAP publication, *The Chair's Guide: Order of Business*)

- Call to Order
- Opening Ceremonies (optional)
- Roll Call (if customary)
- Reading and Approval of Minutes
- Reports of Officers, Boards, and Standing Committees
- Reports of Special Committees (announced only if such committees are prepared or instructed to report)
- Special Orders (announced only if there are special orders)
- Unfinished Business and General Orders
- New Business
- Announcements
- Program (if a program or a speaker is planned for the meeting- many organizations put the program after the opening ceremonies, before the business)
- Adjourn

### **Procedure for Handling a Main Motion**

#### **Obtaining and Assigning the Floor**

1. A member rises when no one else has the floor and addresses the chair: "Mr./Madam President," "Mr./Madam Chairman," or by other proper title. (In a large assembly, the member gives his name and identification.)

The member remains standing and awaits recognition by the chair.

2. The chair recognizes the member by announcing his name or title, or, in a small assembly, by nodding to him.

#### **How the Motion is Brought Before the Assembly**

1. The member makes the motion: "I move that (or 'to')..." and resumes his seat.

2. Another member, without rising, seconds the motion: "I second the motion," or "I second it" or even just "second."

3. The chair states the motion: "It is moved and seconded that .... Are you ready for the question?"

#### **Consideration of the Motion**

1. Members debate the motion.

*Theresa Kosmoski, R.P. - [theresa.kosmoski@gmail.com](mailto:theresa.kosmoski@gmail.com)*

2. The chair puts the motion to a vote.

The chair asks: "Are you ready for the question?" If no one rises to claim the floor, the chair proceeds to take the vote.

The chair says: "The question is on the adoption of the motion that... As many as are in favor, say 'Aye'. (Pause for response.) Those opposed, say 'No'. (Pause for response.)

3. The chair announces the result of the vote.

"The ayes have it, the motion is adopted, and .... (indicating the effect of the vote)," or

"The noes have it, and the motion is lost."

### **Basics: Motions**

There are several *classes* of motions you may encounter in meetings, listed below. The most commonly used motions belong to the *thirteen ranking motions*.

#### Classes of Motions

There are several classes of motions you may encounter in meetings:

The **main motion** is the basis of all parliamentary procedure. All business to be considered by an assembly is introduced by a main motion. This type of motion may only be considered if no other business is pending.

**Subsidiary motions** are those that may be applied to another motion for the purpose of modifying it, delaying action on it, or disposing of it.

**Privileged motions** are motions that are unrelated to the current motion, but are of such urgency or importance that they are considered immediately. These motions are related to members, the organization, and meeting procedure rather than the item of business being considered.

**Incidental motions** are motions that are related to, or incidental to, the business being considered, but do not directly modify the pending motion.

Motions that bring a question again before the assembly, or **bring-back** motions, are a special type of main motion that permit the assembly to consider business that was previously disposed of.

#### Thirteen ranking motions

The main motion, subsidiary motions, and privileged motions all have rank relative to one another. The table below illustrates the motions' rank and basic characteristics.

### Thirteen Ranking Motions

Name of Motion	Is it in order when another has the floor?	Does it require a second?	Is it debatable?	Is it amendable?	What vote is required for adoption?	May it be reconsidered?	
Fix the Time to Which to Adjourn*	No	Yes	No	Yes	M	Yes	PRIVILEGED
Adjourn**	No	Yes	No	No	M	No	
Recess*	No	Yes	No	Yes	M	No	
Raise a Question of Privilege	Yes	No	No	No	(1)	No	
Call for the Orders of the Day	Yes	No	No	No	(2)	No	
Lay on the Table	No	Yes	No	No	M	No	SUBSIDIARY
Previous Question	No	Yes	No	No	2/3	Yes	
Limit or Extend Limits of Debate	No	Yes	No	Yes	2/3	(3)	
Postpone to a Certain Time (Definitely)	No	Yes	Yes	Yes	M(4)	Yes	
Commit (Refer to a Committee)	No	Yes	Yes	Yes	M	(5)	
Amend	No	Yes	(6)	Yes	M	Yes	
Postpone Indefinitely	No	Yes	Yes	No	M	(7)	
Main Motion	No	Yes	Yes	Yes	M	Yes	

Based on *Robert's Rules of Order Newly Revised* (RONR)

\* A main motion if made when no business pending

\*\* Check RONR for specific rules

(1) Chair grants

(2) No vote: demand

(3) Yes, the unexecuted part may be reconsidered

(4) 2/3 vote required if made a special order

(5) Yes, if the committee has not started work

(6) Yes, if applied to a debatable motion

(7) Only an affirmative vote may be reconsidered

Motions have an order, or “precedence” (prece-dens). The lowest ranking motion in the hierarchy is the Main Motion and the highest is Fix the Time to Which to Adjourn. No motion may be made if a motion that is higher in precedence is still pending. An example: a motion for the Previous Question would be out of order if a motion to Lay on the Table has been made but not yet voted upon.

*Finally, the best advice that I can give you:*

**KNOW YOUR BYLAWS.....ALWAYS HAVE A COPY WITH YOU.  
THEY ARE THE MOST IMPORTANT DOCUMENT IN YOUR  
ORGANIZATION AND WILL NEARLY ALWAYS ANSWER YOUR  
QUESTIONS.**

*Theresa Kosmoski, R.P. – [theresa.kosmoski@gmail.com](mailto:theresa.kosmoski@gmail.com)*

# TFRW BYLAWS

2012-2013

Bylaws are your friend!

They are there to assist you and keep you out of trouble!

A copy of sample bylaws, for a TFRW club, is in your Leadership Handbook. Below are some guidelines for you to follow:

\*Check your club's bylaws to see if you need to make any changes.

\*Make sure your club's bylaws are in compliance with TFRW's Bylaws and NFRW's Bylaws.

\*If you do need to make changes, send a copy of the club's entire bylaws indicating the changes you wish to make.

\*Standing Rules should be used whenever possible for such things as date, place and time of your club's meetings. They do not need approval from TFRW.

\*Send all revised/new bylaws to me (see TFRW Bylaws Article IV):

Cheri Creekmore, TFRW VP Bylaws

141 Persia Drive

Universal City, Texas 78148

[rccreekmore@sbcglobal.net](mailto:rccreekmore@sbcglobal.net)

210-659-4399

\*Roberts Rules of Order should be in your possession (along with a copy of your bylaws) at all club meetings.

## 2012-2013

### John Goodwin Tower Award of Excellence

Please keep in your President's notebook or binder along with the Award Checklist and Monthly Planner to help keep your club organized.

The purpose of a Republican Women's Club is:

1. To Educate and inform its members and voters
2. To Recruit Republican Candidates
3. To Elect Republican Candidates

#### Instructions

This is your Unofficial 2012-2013 TFRW John Goodwin Tower Award of Excellence Checklist. It covers the time period January 1, 2012 to December 31, 2012. Please read carefully. The Awards Committee identified specific achievements in five categories that define excellence in meeting TFRW Bylaws and Organization objectives. These achievements were then defined as desired standards for awarding the TFRW John Goodwin Tower Award of Excellence. For new clubs federating in 2012, your annual service charge and full membership per-capita dues must be paid in full by September 10, 2012 to be considered eligible for this Award.

Please note the following important information:

1. Some programs or activities require work in both 2012 and 2013.
2. A "member" is a woman in good standing who has paid her per-capita dues to TFRW through her local club.
3. All REQUIREMENTS contained in each of the five categories must be met.
4. All Bonus Activities are awarded 10 points except CF-1B and CR-1B, both 25 points each.
5. Applications will not be accepted by FAX or email.
6. Questions should be addressed to Awards Chair, Marilyn Davis [marilyndavis17@gmail.com](mailto:marilyndavis17@gmail.com)
7. Total Possible Points:

Required: 475 +

Bonus Activities: 420 =

Grand Total: 895

Minimum number of Points Required for Local Clubs to receive an Award:

10 to 30 members – 600 points

31 to 60 members – 700 points

61 to 80 members – 650 points

126 or more members – 750 points

The Awards will be presented at the 2013 TFRW Convention in San Antonio.

Requirements and Bonus Activities are for the time period: January 1, 2012 through December 31, 2013.

Forms must be postmarked by September 1, 2013

(Certified and/or Return Receipt is recommended for proof of Application mailing).

Mail completed form to:

Marilyn Davis, Awards Chairman

25 Charleston St N

Sugar Land, TX 77478

[Marilyndavis17@gmail.com](mailto:Marilyndavis17@gmail.com)

281-242-9689 home, 281-615-7773 cell

A John Goodwin Tower pin and a Certificate of Accomplishment will be presented to the President of clubs winning this Award. The club in each member category that earned the most points will also be recognized.

#### Total Points

1. CLUB FUNCTION: 350 Points Possible Includes 175 Required
2. MEMBERSHIP DEVELOPMENT: 100 Points Possible Includes 50 Required
3. PROGRAMS: 120 Points Possible Includes 100 Required
4. CAMPAIGN ACTIVITIES: 165 Points Possible Includes 75 Required
5. COMMUNITY RELATIONS/SERVICE: 140 Points Possible Includes 75 Required
- TOTAL: 875 Points Possible Includes 475 Required

### 1. Club Function

#### REQUIREMENTS

All Items CF-1 through CF-6 must be completed and checked to receive 175 points. Partial credit will not be given.

\_\_\_\_\_ CF-1. We hold at least 5 board meetings and at least 5 regular meetings per year.

\_\_\_\_\_ CF-2. Our Treasurer submitted the first installment of dues for 2012 and 2013 plus service charge to the TFRW Office in Austin, postmarked by January 31 of each year.

\_\_\_\_\_ CF-3. A roster of all officers for 2012 and 2013 (names, addresses, phone numbers, email addresses and office held) was mailed to the TFRW office in Austin on or before January 1 of each year.

\_\_\_\_\_ CF-4. Copies of our newsletter or paper copies of our email newsletter were mailed to TFRW President Carolyn Hodges, TFRW Office in Austin, TFRW Public Relations Chairman, Deputy President, District Director and County Republican headquarters.

\_\_\_\_\_ CF-5. We elected or appointed members to serve as Campaign Activities Chairman, Legislative Chairman, and PAC Treasurer.

\_\_\_\_\_ CF-6. We have reviewed our current bylaws, submitted a copy and received notification of approval from the TFRW Vice President-Bylaws, as required by TFRW Bylaws.

#### BONUS ACTIVITIES (Check appropriate item.)

10 points each, except CF-1B

\_\_\_\_\_ CF-1B. Our Treasurer submitted the first installment of dues for 2012 and 2013 plus service charge to the TFRW Office in Austin, postmarked on or before January 15 of each year. (25 bonus points)

\_\_\_\_\_ CF-2B. A member of the TFRW Board of Directors was invited to attend or be a guest speaker at one of our meetings.

Identify member: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ CF-3B. We honored a member(s) at the 2012 Tribute to Women. List names on back of sheet.

\_\_\_\_\_ CF-4B. We are sending a delegate to the 2013 NFRW Convention in Louisville, Kentucky. Name \_\_\_\_\_

\_\_\_\_\_ CF-5B. We are sending delegates to the 2013 TFRW Convention in San Antonio. List names on back of sheet.

\_\_\_\_\_ CF-6B. We contributed to our TFRW delegate's registration fee and/or expenses.

\_\_\_\_\_ CF-7B. We contributed to our NFRW delegate's registration fee and/or expenses.

\_\_\_\_\_ CF-8B. We have appointed a knowledgeable parliamentarian to ensure proper conduct at our meetings and to provide a program to educate members in parliamentary procedure.

\_\_\_\_\_ CF-9B. At least one of our members was a TFRW Patron in both 2012 and 2013.

\_\_\_\_\_ CF-10B. A member, other than a TFRW board member, attended at least one TFRW Board Meeting.

Identify member \_\_\_\_\_

\_\_\_\_\_ CF-11B. We contributed to the registration fee and/or expenses for at least one of our members attending the 2013 Legislative Day in Austin.

\_\_\_\_\_ CF-12B. The names, addresses and telephone numbers of all current local, state and national elected officials having jurisdiction in the area of our club have been published and distributed to our members.

\_\_\_\_\_ CF-13B. We participated in a TFRW sponsored workshop (includes Campaign Management School, Leadership Seminar, Legislative Day in Austin, Parliamentarian Workshop and/or Regional Workshop, etc.).

\_\_\_\_\_ CF-14B. We developed and distributed to our members an annual Membership Directory.

\_\_\_\_\_ CF-15B. We are actively involved in an Outreach Recruiting Program. Provide a brief description:

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

\_\_\_\_\_ CF-16B. We invited our Deputy President and/or District Director to attend our regular meetings.

\_\_\_\_\_ CF-17B. We helped our District Directors and/or our Deputy Presidents with travel expenses and/or our membership dues. This will help defray their costs for Serving our area.

\_\_\_\_\_ CF-18B Our Club helped to host one of the TFRW quarterly Board Meetings by donating at least \$25 for hospitality or by donating small bags of treats.

Total Points – 350 Club Function: 175 REQUIRED POINTS – 175 Possible BONUS POINTS

## 2. Membership Development REQUIREMENTS

Items MD-1 and MD-2 must be completed and checked to receive 50 points. Partial credit will not be given.

\_\_\_\_\_ MD-1. We held at least one function in both 2012 and 2013 for membership recruitment.

Identify type of function (i.e. Coffee, Brunch, Luncheon, etc.) and dates.

\_\_\_\_\_



\_\_\_\_\_ MD-2. We provided an orientation for our new members on club functions and activities.

Describe Orientation: \_\_\_\_\_

#### BONUS ACTIVITIES (Check appropriate item.)

10 points each

\_\_\_\_\_ MD-1B. We have maintained at least the same number of members in 2012 and in 2013 as we had October 31, 2011 (last day for federating 2011 members).

\_\_\_\_\_ MD-2B. We also welcomed 1 new member in 2012 or 2013; plus

\_\_\_\_\_ a. We welcomed an additional 2 – 4 new members in 2012 or 2013; plus

\_\_\_\_\_ b. We welcomed an additional 5 – 9 new members in 2012 or 2013; plus

\_\_\_\_\_ c. We welcomed an additional 10 or more new members in 2012 or 2013.

Total Points – 100 Development: 50 REQUIRED POINTS – 50 possible BONUS POINTS

### 3. Programs

#### REQUIREMENTS

All Items P-1 through P-4 must be completed and checked to receive 100 points.

Partial credit will not be given.

\_\_\_\_\_ P-1. We are striving to become more issue-oriented. We had at least three issue programs in 2012 and three in 2013. Possible topics to consider should be current political topics and issues of local, state or national interest, such as: health care legislation, education, immigration, water for Texas, the Constitution, homeland security, border security and/or women's issues.

Provide 6 program titles date speaker

2012

1. \_\_\_\_\_

2012

2. \_\_\_\_\_

2012

3. \_\_\_\_\_

2013

4. \_\_\_\_\_

2013

5. \_\_\_\_\_

2013

6. \_\_\_\_\_

\_\_\_\_\_ P-2. We held at least one program or workshop in 2012 or 2013 that discussed state election laws, Party rules and the Party convention process.

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

\_\_\_\_\_ P-3. We presented to our members information pertaining to Federation structure. (See TFRW Handbook)

\_\_\_\_\_ P-4. Reports on current state or national legislation are given at every business meeting or published in our newsletter or via Internet.

BONUS ACTIVITIES (Check appropriate item.)

10 points each

\_\_\_\_\_ P-1B. We developed and implemented a plan of action to lobby our local, state and/or national elected officials on an issue important to Republican women. Provide a brief description of the issue and your actions.

---

---

\_\_\_\_\_ P-2B. We were represented at the NFRW Legislative Day on the Hill in Washington, DC and/or TFRW Legislative Day in Austin (2013).

Total Points – 120 Programs: 100 REQUIRED POINTS – 20 possible BONUS POINTS

#### 4. Campaign Activities

##### REQUIREMENTS

All Items CA-1 through CA-3 must be completed and checked to receive 75 points. Partial credit will not be given.

\_\_\_\_\_ CA-1. We have contributed to campaigns of Republican candidates and/or promoted the election of Republican candidates. (Such as contribute to Republican Headquarters, candidate's forums, etc.)

List name(s) and office(s) sought.

\_\_\_\_\_ CA-2. Our Campaign Activities Chairman has kept a record of campaign hours volunteered by members and submitted the hours on the TFRW Campaign Activities Online form by the specified deadlines. The Campaign Activities Chairman should encourage the membership to report campaign activities hours.

\_\_\_\_\_ CA-3. Our members worked in at least one Voter Identification (Voter ID)/Get Out The Vote (GOTV) program sponsored by our club, the Party or a Republican candidate. *(This could be a telephone bank, door-to-door canvas, or mail out.)*

Description: \_\_\_\_\_

BONUS ACTIVITIES (Check appropriate item.)

10 points each

\_\_\_\_\_ CA-1B. Republican primary candidates (all in any given race) have been invited to speak, participate in a forum or appear as guests at one of our meetings.

\_\_\_\_\_ CA-2B. We promoted, contributed to financially or worked in the campaign of a Republican woman candidate(s). List name(s) and office(s) sought.

---

---

\_\_\_\_\_ CA-3B. At least one of our members worked as an election judge, alternate judge, clerk or poll watcher in the 2012 primary or general election.

\_\_\_\_\_ CA-4B. Our members have donated volunteer hours to the state or county Republican organization (headquarters office, precinct work, etc.).

\_\_\_\_\_ CA-5B. Our members have participated in a telephone hotline, email and/or letter writing campaign to promote GOP legislation at the local, state or national level.

\_\_\_\_\_ CA-6B. At least one of our members serves on a local, state or national board or commission. List name(s) and position(s) (i.e. May include chamber of commerce, museum board, church board, etc.)

---

\_\_\_\_\_ CA-7B. Members of our club attended their 2012 precinct convention.

\_\_\_\_\_ CA-8B. At least one member was elected to serve as a county, district or state party officer in 2012 or 2013. This includes precinct chairs, party officers and SREC or NRC members. List name(s) and position(s).

---

\_\_\_\_\_ CA-9B. Share a creative way your club has raised funds for a Republican Candidate and/or Republican Party.

---

Total Points – 165 Campaign Activities: 75 REQUIRED POINTS – 90 possible BONUS POINTS

## 5. Community Relations/Service REQUIREMENTS

Items CR-1 through CR-3 must be completed and checked to receive 75 points. Partial credit will not be given.

\_\_\_\_\_ CR-1. We have an on-going voter registration program or have sponsored at least one voter registration (VR) drive during the 2012-2013 Award cycle.

\_\_\_\_\_ CR-2. We have undertaken and completed at least one community service project and promoted it to the media. Some examples are: mentor programs, latchkey children's projects, family shelters, drug prevention programs, The Dictionary Project, military (troop) support or natural disasters. Provide a brief description.

---

\_\_\_\_\_ CR-3. We promoted and participated in the Barbara Bush Literacy Library Project (BBLLP) and/or the Mamie Eisenhower Library Project (MELP) in both 2012 and 2013. List Book and recipient:  
2012 \_\_\_\_\_

2013 \_\_\_\_\_

BONUS ACTIVITIES (Check appropriate item.)

10 points each, except CR-1B (25 bonus points)

\_\_\_\_\_ CR-1B. We contributed to the TFRW State Scholarship in both 2012 and 2013. (25 bonus points)

\_\_\_\_\_ CR-2B. We established and/or contributed to a scholarship fund for a local woman.

\_\_\_\_\_ CR-3B. We sponsored programs and/or provided materials to public, private and/or home schooled students which covered one or more of the following issues: the Constitution, Republican vs. Democrat philosophy, local, state and federal government systems, Citizen Responsibilities.

\_\_\_\_\_ CR-4B. We donated more than 500 volunteer hours toward Community Service projects in 2012 and 2013.

\_\_\_\_\_ CR-5B. We developed a creative fundraising event or project for our Community.  
Total Points – 140 Community Relations/Service: 75 REQUIRED POINTS – 65 possible  
BONUS POINTS

This form is only partially updated by Leadership Day, February 4, 2012.



Texas Federation of Republican Women

# **CLUB ACTIVITIES**

## **Camp**

- Fundraising
- Campaign Activities
- Publicity & Social Networking



# FUNDRAISING TIPS

When doing a fundraiser, make sure it is unique to your area and will be of interest to the community. This is important for a successful fundraising event. As club funds may be used to underwrite the event, you must ensure its success by having your club's board approval and if necessary, the membership approval for expenditures.

Please check with the TFRW PAC Chair if in doubt as to how to comply with all the TEC rules/regulations (i.e. sales forms, sales tax). It is important that all events be entered into your clubs PAC report correctly after each event. Each TFRW Federated club is a Political Action Committee (PAC) and must comply with the TEC (Texas Ethics Commission).

Refer to your Leadership Handbook for additional fundraising ideas and suggestions.



**NOTE:** Be sure that prospective purchasers of your goods and services clearly understand that they are making **POLITICAL CONTRIBUTIONS**. This is obvious if the fundraising is done at regular club meetings or special events. It is also easier to track contributors in the controlled environment of club activities. In venues open to the public, it must be clear that funds raised support your club and its political activities.

\*\*\*\*Disclaimers should be on each piece of literature or fundraising information that is sent out from the club for the event, including your monthly newsletter. Example – “Political Advertising Paid for by *Name of Club*” on newsletter, plus “Donations cannot be used as deductions for federal income tax purposes” on all fundraising literature.

\*\*\*\***Raffles may not be held as they are illegal in Texas except in rare circumstances that never apply to our clubs.**

**Jody Rushton**  
**rjrushton@verizon.net**

**CAMPAIGN ACTIVITIES**  
**Policy for Counting Campaign Hours**  
**2012-2013**

I. Below are some clarification points of these policies for club members and associate members to follow when completing their “Individual Record Form for Campaign Hours.” Though the individual forms vary from club to club, the policies presented by TFRW will be the same no matter what form of reporting your club chooses to use.

II. Fundraisers and Special Events for Republican Women Clubs, Local, State and National Republican Party Clubs.

- A. Work done to plan, prepare, and conduct a fundraiser to earn money for political activities of the club or for candidate(s), counts as Volunteer Campaign Hours (VCHrs.)
- B. Special Events, such as campaign rallies, counts as VCHrs if it directly supports the advancement of Republican philosophy and policies. The intent of the “Special Event is to elect Republican candidates and further the Republican platform.

III. Training Seminars/Workshops count as Volunteer Campaign Hours.

- A. You may count time spent planning, organizing and conducting training seminars/workshops whose purpose is to further the Republican philosophy and political views with the intent of getting Republicans elected. National, State, or Locally sponsored seminars/workshops may count as VCHrs. This includes, Campaign Management Schools, Get Out the Vote Seminars, Poll Watcher Training, Election Judge and Election Clerk Training, and Leadership Training. These training hours do not count if one is paid. However the hours DO COUNT, if one turns the money earned to a county party, your local Federated Republican Women’s Club, a candidate or the TRFW PAC.
- B. You may count time spent preparing for and attending TFRW meetings, to include Legislative Day and the TFRW Convention. You may count travel to and from the meetings.
- C. You may count time spent as a participant in the training mentioned above to include travel to and from the training.
- D. Presenting political programs or speeches at Republican Women Club meetings and other Republican Clubs. You may also count such programs and speeches given at local civic clubs. You may include travel to and from the meeting.

IV. Officers of Republican Women Clubs may count time spent on completing the duties required of that office. This may include administrative work, mailings, and other clerical work. You may count time spent on such duties as an individual or in committee meetings held at a time OTHER than the club’s Regular Business meeting. DUE TO THE NATURE OF CLUB BOARD MEETINGS, those who attend the Board Meetings may count the travel to and from the meeting AND the time spent at the Board Meetings.

V. Chairpersons of Republican Women clubs or other Republican clubs may count time spent to complete the work required of the position as Volunteer Campaign Hours. You may count time spent on such duties as an individual at home or in a committee meeting. Again, after Club's Regular meeting, Officers and Committee Chairs can count work done to complete the duties of their position.

VI. Are there times you DO NOT COUNT HOURS? Yes, we DO NOT count the hours that we spend at club's Monthly Meetings. We count the travel time – how long it takes you to get to the meeting and to get home. But, if a club member goes to work at Republican Party headquarters after the meeting, the member would count those hours worked at headquarters. If a club member works on a Republican Women's club project or duty after a regular meeting, those hours may be counted. Money donated to the club or to a candidate CANNOT SUBSTITUTE FOR VOLUNTEER HOURS WORKED! Associate Members would follow the same guidance.

VII. Where to Record Your Volunteer Campaign Hours.

- A. Use the categories indicated on YOUR club's "Individual Record Form" for reporting volunteer campaign hours. The "Other Category" may be used to record hours if you cannot determine the appropriate category listed on your club's "Individual Record Form." The local club Campaign Activities Chair may advise the members and associates as to which category is best suited for the type of work the individual completes. **IF THE "OTHER CATEGORY" IS USED TO RECORD HOURS**, the individual must specify the activity or event in the space provided next to the word, "Other."
- B. The local club Campaign Activities Chair and/or local club President may, if needed, verify the time spent on an activity or event as "Volunteer Campaign Hours." Verification of certain volunteer campaign hours should occur if an activity or event is in question. The local club Campaign Activities Chair (or whoever the President assigns this duty) is responsible for reporting **ONLY THE TOTAL NUMBER OF HOURS the club's members and associates have earned for each Quarter, by using the New On-Line Reporting System.**

VIII. Caring for America.

- A. First, Caring for America hours **ARE NOT PART OF THE REGULAR QUARTERLY REPORT OF CAMPAIGN HOURS.** The **TFRW Caring For America Chair** will issue a policy to the clubs as to what "work" counts as Caring For America hours. She will also issue her procedure to report these hours.



# Volunteer Hours Reporting Form

## Put Your Club Here

Year **2012** \_\_\_\_\_

Quarter **1st** \_\_\_\_\_

Precinct # \_\_\_\_\_

Name: \_\_\_\_\_ Member \_\_\_\_\_ Associate \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ Zip: \_\_\_\_\_

Phone \_\_\_\_\_

Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Campaign Hrs (Sect 1 & 2) \_\_\_\_\_

Section 1 Indicate your hours worked in the following activities				
Jan	Feb	Mar		
			Precinct Chair	
			State or County Party Official	Position:
			Local, State or Nat'l Campaign Mgmt School Attendance	School Attended:
				Did you give a check to a political entity?
			Poll Watcher*	Yes No
			Election Judge*	Yes No
			Alternate Judge*	Yes No
			Election Clerk*	Yes No
			Election Official	Position:
			Precinct Convention Participant	
			County Convention Delegate	
			State Convention Delegate	
			Nat'l Convention Delegate	

\* Usually indicates paid positions – does not count as volunteer hours unless check is given to the County Party, Local Republican club, a Candidate, or the TFRW PAC.

Section 2: Campaign Work Hours			
Jan	Feb	Mar	
			Work at home, mailings, phoning, posters, clerical, cooking, etc
			Work at or for a special event (but not as a guest)
			Attendance at (travel to) Federation Board Mtgs/Conventions as well as committee work in preparation
			Political work while at Federation meetings
			Travel Time between events, except stopping
			Volunteering at any county, state, or Federation HQ
			Volunteering for a Republican candidate for a non-partisan office such as school board
			Presenting political programs or speeches at local civic clubs
			Running for office – all time spent campaigning
			Campaign sign preparation, distribution and removal
			Volunteering for a Republican candidate in any capacity
			Voter Registrar / GOTV ("Get Out The Vote") participant
			Board meeting participant
			Other work, describe briefly:

Section 3: "Caring for America" Hours			Total Hours
Jan	Feb	Mar	
			Books for schools, libraries
			Nursing home gifts, work, etc.
			Women or children's issues
			Military Support Projects
			Other work, describe briefly

Please report your hours in each section and return this form to the Campaign Chair. If there are time constraints involved, the information can be turned in by phone or email, with the form turned in later.

ATTENTION: Campaign Activities Chairs! The form below may be used as an **internal** cover page for the members individual report of campaign hours turned into to you. The cover sheet gives you a paper copy of the total number of hours you have entered online. The CA **may** use this form to track their club's total hours for use when turning in NFRW Awards' and TFRW Awards' Applications. **Of course, the CA can create her own form to help track the club's hours.**

***2011 - 2013 CAMPAIGN ACTIVITIES  
QUARTERLY VOLUNTEER HOURS REPORTING FORM***

CLUB NAME: \_\_\_\_\_  
 CLUB PRESIDENT FOR 2012: \_\_\_\_\_  
 CAMPAIGN ACTIVITIES CHAIRMAN: \_\_\_\_\_  
 PHONES: (H): \_\_\_\_\_ (M) \_\_\_\_\_  
 E-MAIL: \_\_\_\_\_

**TOTAL HOURS FOR THE FOLLOWING QUARTERS:**

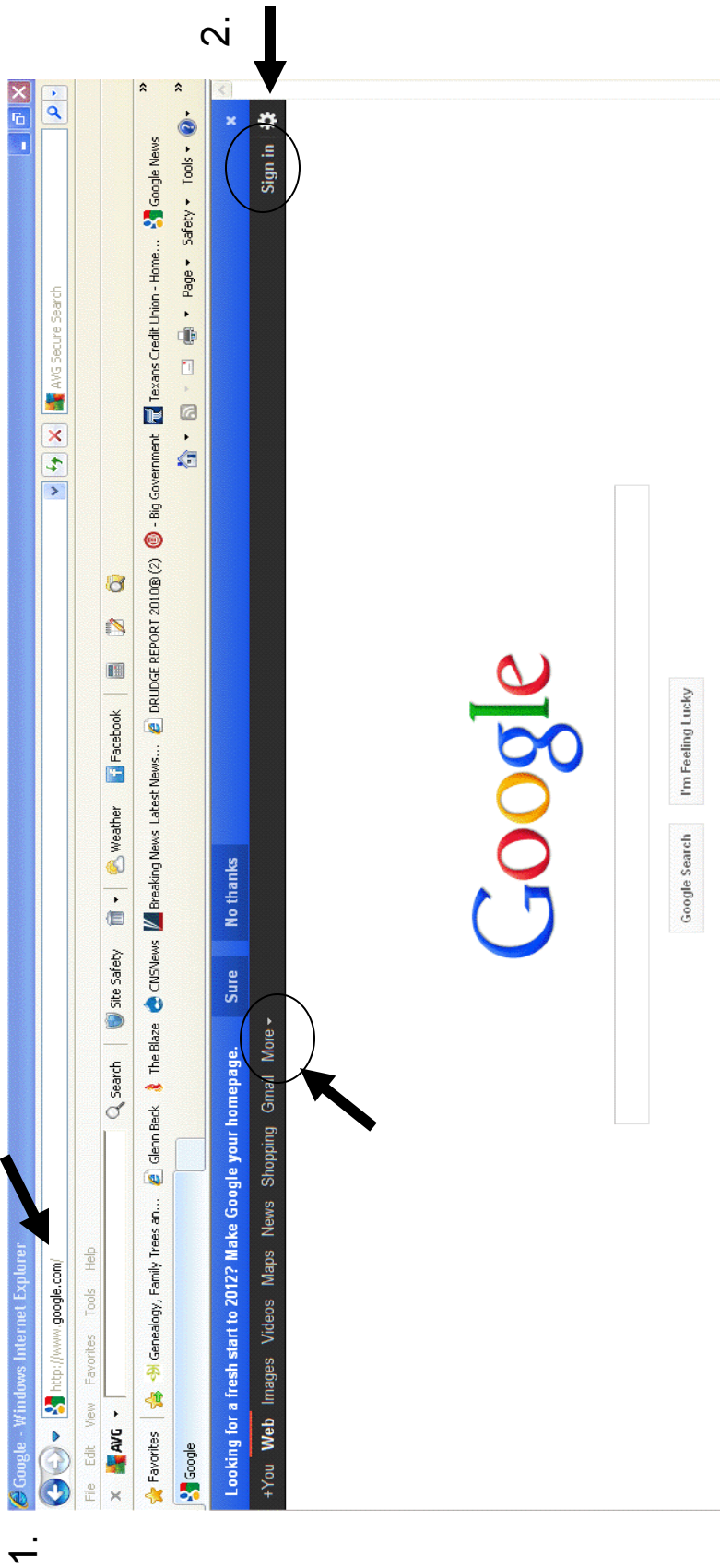
July 1 – Sep 30, 2011 (NFRW Only)	TOTAL HOURS _____
Oct 1 – Dec 31, 2011 (NFRW Only)	TOTAL HOURS _____
January 1 – March 31, 2012 (Begins TFRW Awards Cycle)	TOTAL HOURS _____
April 1 – June 30, 2012	TOTAL HOURS _____
July 1 – September 30, 2012	TOTAL HOURS _____
October 1 – December 31, 2012	TOTAL HOURS _____
January 1 – March 31, 2013	TOTAL HOURS _____
April 1 – June 30, 2013 (NFRW Only)	TOTAL HOURS _____
July 1 – September 30, 2013 (TFRW Only)	TOTAL HOURS _____

***TOTAL Hours for the 2-year cycle for TFRW Awards (January 2012 thru September 2013 – Deadline will be determined by the TFRW Awards Chair***

***TOTAL Hours for the 2-year cycle for NFRW Awards (July 2011 thru June 2013 -- deadline June, 2013***

**Input your volunteer hours on [www.google.com](http://www.google.com) using your assigned gmail account and password. Jeanette Sterner, [jeanettehlr@flash.net](mailto:jeanettehlr@flash.net); 903-769-0962.**

1. At the URL, input google.com. Note the black banner with titles on the google page. You will only use 'sign in' on the right, then 'more' after signing in.



2. Click on 'sign in' and put in the gmail and password you have been given. After you sign in, you will notice that the 'sign in' title has been replaced with your gmail which indicates that you are now in the application.

3. Click on 'more' and in the drop down box, select 'documents'.
4. Click on your area and the sheet of club listings will come up

**3.** Click on 'more' and in the drop down box, select 'documents'.

**4.** Click on your area and the sheet of club listings will come up

Note you are signed in.

Google

Translate  
Books  
Finance  
Scholar  
Blogs  
YouTube  
Calendar  
Photos  
Documents  
Sites  
Groups  
Reader  
Even more »

Google Search  
I'm Feeling Lucky

Google Docs

CREATE

Home

Starred

Area1\_Clubs Shared

OWNER: James McGrody  
LAST MODIFIED: Jan 2 me

5.

TFRW Leadership Day 2012 Training Manual

၆

You are putting the sheet back into the file.



7. After closing the club listings, you should be back at the file level. On the right is your gmail / volunteer hours title. Select it and a drop down box will appear – select ‘Sign out’

You have successfully put in your hours – Thanks for participating !!

7.

The screenshot shows the Google Docs web interface. At the top, there is a navigation bar with links for '+You', 'Gmail', 'Calendar', 'Documents', 'Photos', 'Sites', 'Web', and 'More'. Below this is the Google logo and a search bar. On the left side, there is a sidebar with a 'Home' button and a 'CREATE' button. The main area displays a document titled 'Area1\_Clubs Shared' with a star icon and a 'HOME' button. In the top right corner, there is a user profile section for 'volhrs1@gmail.com' with links for 'Volunteer Hours', 'Join Google+', 'Privacy', 'Account settings', and 'Sign out'. A black arrow points to the 'Sign out' link.

Helpful hints:

Remember: in google – if you sign in, you need to sign out !

Some have written their gmail and password on this presentation – that way they don’t have to hunt for it everytime they get into the system.

When you are in the google environment, do not make a copy of the club listings.

It is very confusing for the next club putting in their hours – they don’t know which one to use. We have had clubs put their hours into the copy and therefore those hours were not posted on the main file that we are all suppose to use.

If you change your email/phone number or if the CA for your club changes, please notify Jeanette Sterner at

[jeanettehlr@flash.net](mailto:jeanettehlr@flash.net) phone:903-769-0962

Email: if you are asking a question, it is very helpful for you to put your area and your club name in the subject line.

## Public Relations Basics

*Make use of your programs, projects, and special events, to create a positive image for your club in the community. This in turn, will bring in more members and maximize your impact on local, state, and national politics!*

### Create a Media List

Include your local town or county newspapers or magazines, online media outlets like local blog sites or news sources, local radio and television reporters. Some media outlets may never respond, but if sent electronically, frequent releases cost you nothing, and your persistence may eventually pay off. Don't forget to post your releases on your website, Facebook, etc.

### Every News Release Includes:

- \*Club Name at the top
- \*RELEASE INFORMATION LINE (Use all caps here)
  - 'FOR IMMEDIATE RELEASE', or 'FOR RELEASE ON (DATE)', or 'COMMUNITY CALENDAR LISTING'
- \*Contact person, phone number, and email
- \*Subject
- \*Headline
- \*Body
  - Who, what, when, where, why, and sometimes, how
  - boilerplate
    - A standard informational paragraph about your club, included in every release, may also appear on your website, Facebook page, etc.
- \*Indication of completion “####” or “-30-” (an industry standard)
- \* Standard Political Disclaimer for your club

**News Releases may be sent prior to an event** to add to community calendars or to encourage coverage of the event. If you want the media to cover your event, give them plenty of notice, and invite them with a personal note in addition to the Release. It also helps to personally call a local reporter to ask them to attend.

**News Releases may also be sent after an event** as a complete article. If you don't have a 'writer' in your club, send a photograph along with information on when and where it was taken, and who is pictured. Photo captions are usually 2-3 succinctly written sentences.

### Post-Event Articles should read just like a newspaper article with:

- \*A 'hook' sentence to catch the reader's attention
- \*Basic information in the first paragraph
- \*Quotes from attendees
- \*The 5 W's, and maybe a 'How' (How to get more info, join, etc.)
- \*Boilerplate!
- \*A photograph

*Sample News Release:*

## **Momma Grizzlies Republican Women**

101 Main Street  
Texas Town, TX 78777  
[www.wegrowlrw.com](http://www.wegrowlrw.com)

FOR IMMEDIATE RELEASE

Contact: Sarah Bachmann  
(512) 000-0000  
[sarahgrowls@aol.com](mailto:sarahgrowls@aol.com)

February 1, 2012

### **GOP Women Hold Forum For Senatorial Candidates**

#### **GOP WOMEN LEASE CONVENTION HALL FOR CANDIDATE DEBATE**

Expecting record number crowds, the Momma Grizzlies Republican Women have leased the Texas Town Convention Hall for the Senatorial Candidate Forum they will host on Friday, February 10. The event will begin at 7pm and the club has invited all 27 Republican candidates for the U.S. Senate seat held by retiring Senator Kay Bailey Hutchison. The general public is invited to attend; tickets are \$5. Complimentary press passes are available to qualifying media. Tickets may be purchased through the club website at [www.wegrowlrw.com](http://www.wegrowlrw.com) or by calling (512) 000-1111.

Of the 27 Republican candidates for U.S. Senate, 26 have confirmed they will attend, including Maura Less and Izzy Wright. Less and Wright have been vigorously debating the issue of standardized tests and whether or not such tests discriminate against students who just don't care. At last week's candidate forum in Dallas, the debate turned physical when Ms. Less threw her water bottle at Mr. Wright, prompting him to respond in kind. The two have assured the Momma Grizzlies that they will refrain from any physical responses.

Founded in 2008, the Momma Grizzlies Republican Women are devoted to promoting an informed electorate, electing solidly Republican candidates, and working to impact local, state, and national politics. In addition, the club provides scholarships to young women of the county, and through an active Literacy Project, donates dictionaries to area third-graders, copies of the U.S. Constitution to fifth-graders, and quality books to local libraries. For more information on MGRW monthly meetings, events and activities, visit our website at [www.wegrowlrw.com](http://www.wegrowlrw.com).

###

POLITICAL ADVERTISING PAID FOR BY THE MOMMA GRIZZLIES REPUBLICAN WOMEN.



## **Online Marketing for TFRW Clubs**

New online technologies are introduced to the world on a near daily basis, resulting in many ways to reach an online audience. Here are the most widely-used at the moment:

### **Facebook**

If your club does not have funds for a website, you can always use Facebook to establish your online presence. Even if you have your own website, remember that Facebook has over 500 million users, so it is a great outreach/PR tool.

**Cost:** Free

**Website:** [www.facebook.com](http://www.facebook.com)

**“How To” Helps:** ***Mahalo***, an online “knowledge sharing service,” has easy-to-understand, step-by-step instructions for setting up and maintaining a Facebook account, and there is even an instructional video for visual learners. <http://www.mahalo.com/how-to-use-facebook>

***TechSoup*** is an online source devoted entirely to non-profit organizations, and while they primarily work with 501c3's, their article on using Facebook as a non-profit is also very helpful. <http://www.techsoup.org/community/facebook/index.cfm> *TechSoup* also offers 'how-to' articles and webinars on a variety of tech tools.

### **Scribd**

Scribd is an online reading and publishing company that allows users to upload documents. If you do not have a website, this is a great place to post your news releases online. You can then direct readers to your document by posting a link on Twitter and Facebook. This will also allow internet users to 'find' you using a search engine like Google.

**Cost:** Free

**Website:** [www.scribd.com](http://www.scribd.com)

**“How To” Helps:** <http://www.scribd.com/scribd101>

### **Twitter**

Twitter is *NOT* a substitute for a website or Facebook page; Twitter is best for directing followers to your other online resources. With a Twitter Account, you 'follow' others and encourage them to 'follow' you. All of your posts are visible to your followers, but remember, just like anything you put online, posts are visible to everyone in the world' Twitter posts are public statements, *NOT* private communications.

**Cost:** Free

**Website:** [www.twitter.com](http://www.twitter.com)

**“How To” Helps:** TechSoup has a 1 hour presentation on both Twitter and Flickr at <http://www.techsoup.org/learningcenter/internet/webinars/page12235.cfm>

## Website Basics

Websites come in all “shapes and sizes” so to speak! A website can be limited to an online brochure with only basic information about your club, can consist of a fully loaded toolbox with dynamic pages for every visitor and officer of your club, or a site that falls somewhere in between. While you can find 'free' websites, keep in mind that you do get what you pay for.

While website needs will vary from club to club, here are the *very basic* steps:

### **-Register Your Domain Name**

This is your 'address' on the internet (like [www.tfrw.org](http://www.tfrw.org)) Even if you are not quite ready to create your website, you can purchase the name for about \$10 per year. There are several services that will help you obtain a domain name. (One that just happens to be Republican is <http://oodadomains.com/> ) In addition to a domain name, you may also need to pay a web hosting fee. There are also some very useful “all in one” services that provide a domain name, hosting, design templates, email, and more, for an affordable monthly fee. Check out the top 10 for 2012 at: <http://www.webhostingfreereviews.com/10-best-website-builders-2/>

### **-Define Your Needs**

The functions you choose for your site will determine the price for a web design or redesign. At the very least, RW clubs should include information on Who you are, What you do, Why you do it, When and Where you do it, and How to get in touch with you. Not sure what to include? Check out the National Federation of Republican Women's “Winning Webs” at [www.nfrwwinningwebs.org](http://www.nfrwwinningwebs.org) The Winning Web application form can serve as a starting checklist, and you can view the sites of past winners for inspiration.

### **-Choose a Designer or Web-Design Tool**

There are many companies eager for your business, so consider taking bids for your website project. While large companies employ a webmaster to maintain complex operations, **there is no good reason a Republican Women's Club should have to pay anyone to maintain a website!** An RW web-design should allow a volunteer from your club to update information without a degree in computer programming and without purchasing expensive software in addition to the design. I recommend that you ask for an easy-to-use *content management system (or CMS)* built on *open source software*.

Depending on your needs, a good, professional web design will cost anywhere from \$300 (freelance designer) to \$5,000, but there are some free and low-cost services you can use to set up a basic website. Some online web building tools that are relatively easy to use are **Doodlekit.com, Weebly.com, and Homestead.com**. These sites have both 'free' and low-cost options.

**Google Sites** allows you to set up a 'free' website, just keep in mind you will not own your domain name, your site address will be more complicated, and you will not have as much flexibility for future expansion.

<http://www.google.com/sites/help/intl/en/overview.html>



## NFRW Public Relations Committee

# Parts of a Newsletter

Jacci Howard Bear of **About.com Guide** identifies twelve parts of a newsletter you may wish to use in the layout of your club publication:

1. **Nameplate.** The title or nameplate of the newsletter appears in a banner on the front of the newsletter. The banner usually includes a logo of the organization sponsoring the publication or a picture or item of clipart that reflects the interests of the organization. A subtitle or motto may be included along with the volume and issue numbers as well as the month and date of publication.
2. **Body.** The articles and content of the newsletter make up the body of the publication. Headlines, photographs, decorative text elements, and clip art help organize the content and provide visual interest.
3. **Table of Contents.** On the first or second page the reader should find a list of articles and special sections of the newsletter. Frequently seen as “In This Issue”- page numbers direct the reader to specific content items.
4. **Masthead.** The masthead lists the names of the publisher, editors, key newsletter staff members, and contributors. A brief motto or philosophy of the publication may be included as well as a disclaimer statement. The masthead usually appears on the second page, but could appear on any page.
5. **Headings and Titles.**
  - Headlines. Each newsletter article is highlighted by a title in large, bold print. A short phrase or “kicker” may be set off above the headline and helps to identify a regular column. A “deck” refers to one or more lines of text found between the headline and the body of the article, and elaborates or expands on the headline and topic.
  - Subheadings. Within the body of an article, subheadings help to provide greater clarity to the topic and divide the article into smaller sections.
  - Running Head. The running head or “header” is repeated text (often the title of the publication) appearing at the top or bottom of each page or every other page of the newsletter. The page number is sometimes incorporated into the header.
6. **Bylines.** Beneath the title of the article or at the end of the article, identify the author’s name. A short phrase or paragraph about the author or contributor may also appear with the article. (The term “byline” comes from the *By* appearing before the writer’s name.)
7. **Continuation Lines.** Long articles may begin on one page and be continued on another page. Direct the reader to the continuation by using a “jumpline” to indicate that the article continues

on another page, as in *continued on page 4*. At the top of page 4 include a jumpline indicating the page on which the article originated, as in *continued from page 2*.

- 8. Page Numbers.** Page numbers may appear at the top or bottom of pages; on the left, right or the numbers may be centered. Page 1 may or may not be numbered but is included in the number count of pages for the publication.
- 9. End Signs.** A symbol or icon called a “dingbat” may be used to mark the end of an article, signaling the reader that they have completed reading the article.
- 10. Pull-Quotes.** Highlight a significant statement or selection of text from an article by “pulling it out and quoting” it in larger print or in boldface. Pull quotes are frequently boxed and placed in the center of a page in the article.
- 11. Photographs and Illustrations.** The design layout of the newsletter is made more interesting through the use of photographs, clip art, charts and diagrams.
  - Head Shot or “Mug Shot.” The head shot is a close photo of a person (shoulders and head) looking into the camera.
  - Group shots. Pictures of posed groups of people, i.e. new officers, award winners etc..
  - Candid shots. Candid pictures are usually unposed, and tell the story of an event.
  - Caption. Above, below or to the side of a photograph or illustration, include a phrase, sentence or paragraph describing the content.
- 12. Mailing Panel.** If the newsletter is to be mailed, include a mailing panel on the last page. This panel will provide space for a return address, the mailing address or mailing label of the recipient, and postage. If the newsletter is to be emailed or posted on a website, this space may be used for additional newsletter content.

#### **Resources:**

Beach, M. (1988) *Editing your newsletter*. Portland, OR: Coast to Coast Books.

Bear, J. H. (2010). *12 parts of a newsletter*. About.com

Weverka, P. (2007). *Microsoft office 2007 for dummies*. Hoboken, NJ: Wiley Publishing, Inc

Texas Federation of Republican Women

# **CLUB GROWTH** **Camp**

- Membership
- Outreach/Strategic Partnerships
- Programs



# Membership - Club Growth

Presented by Judy Parada

## WOMEN IN NUMBERS ---> WIN IN NOVEMBER

### Membership Chairman - Duties & Reports

**Duties - See page 105 in the Leadership Handbook**

- Keep records of membership - report at meetings
- Provide sign-in sheets and name tags
- Introduce guests, candidates, elected officials, and new members
- FORM A COMMITTEE to recruit, encourage and mentor new members
- Plan a membership event
- Create "new member packets" - welcome letter, directory, newsletter, etc.
- Membership Directory – consider photos, ads

**Reports - See page 90 in the Leadership Handbook**

- Make timely and frequent membership submissions to TFRW. Each submission is numbered sequentially. Keeping lists current and correct will ensure that your members receive the "Texas Star" newsletter and other TFRW & NFRW notifications.
- Notify TFRW of any changes or corrections
- Excel Spreadsheet available
- What are Credits?

### Membership Success Stories

- Happy Hour - Friday after work
- Politics 101- meet in small groups, Saturday chats
- Chili -Out Dinner- New member Recruitment
- Be a Membership Ambassador
- "Sippin' with the Senator" & "Cookin' with the Congressman"
- College Membership Tea
- Constitution Revolution - Small group discussions
- Membership Orientation Recruitment Tea

### Create Prospective Member List

### Retention of Members

- Retention rate is a good measure of member satisfaction.
- Understanding retention gives you an understanding of the strengths and weaknesses of your club.
- Smooth renewal process
- Occasionally survey members
- Maintain good communication
- Acknowledge jobs well done
- Promote membership All Year long

**Welcome New Members:**

- Thank You note
- New Member Orientation Packet - emailed
- Names in Newsletter
- New members on Committees

**Tools for Increasing Membership**

- NFRW Membership Handbook
- Guide to forming New CLubs
- Tri- fold Local Club Brochure

**Goals**

- 15% increase in each club

**Recruiting New Members**

- Be upbeat, enthusiastic, positive, and politically knowledgeable
- Share the goals of the federation: Elect Republicans to office and educating women in the political process
- A personal approach makes newcomers feel welcome and encourages repeat visits.
- Always have name badges. Assign a member to introduce them around.
- Prospective members and visitors need to get to know what you do in order to want to join.
- Ask everyone to join at meetings and events
- Invite guests back at the end of a meeting.
- Follow up with newcomers individually by phone or e-mail

**Identify Potential Members**

- GOP office holders or wives
- Precinct chairs
- Frequent Republican primary voters
- New residents
- Naturalized citizens
- Members of other women's organizations
- Remind members to bring guests
- Leave club brochure with realtors and newcomers groups.

**Keeping Members**

- Get new members Active
- Active members are more likely to renew than uninvolved members
- Most enthusiastic when they join - want to do something meaningful and they want to learn about campaigns, conventions and issues
- Spotlight new members at meetings or in newsletter
- Encourage new members to attend TFRW events
- Welcome new ideas and energy
- Volunteers make sure new members have a good time and meet other new people



---

---

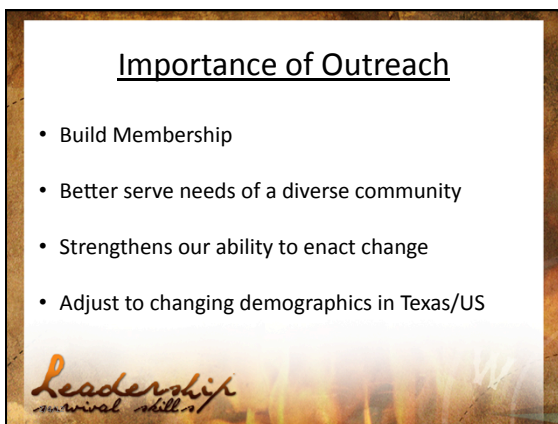
---

---

---

---

---



---

---

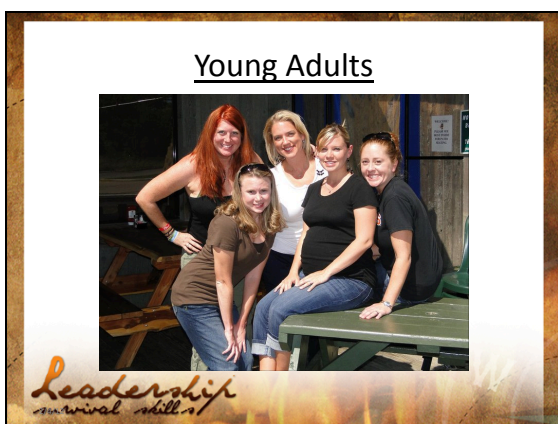
---

---

---

---

---



---

---

---

---

---

---

---



**Who are Young Adults?**

- Millennials/Generation Y
- Politically engaged
- Tech-savvy
- Live paycheck-to-paycheck, have debt
- Diverse – 40% Black, Latino, Asian or mixed
- Desire to work in teams, variety of tasks, seek leadership, need frequent feedback, flexibility, ready to take on the world

*Leadership survival skills*

---

---

---

---

---

---

---

**Why Engage Young Adults?**

- To win future elections
- Young adults are voting
  - 3.7 million in Texas (larger bloc than “Seniors”)
  - In 2008, 39% voted in Texas
- Changing Demographic

*Leadership survival skills*

---

---

---

---

---

---

---

**The Changing Youth**

- 25 million people in Texas
  - Up 20% since 2000
  - Minorities account for 89% of growth
- Added nearly 1 million children under 18 – 95% of them are Hispanic
- Overall: 45% White, 38% Hispanic, 12% Black, 4% Asian
- Under 18: 48% Hispanic, 34% White
- “Aging Anglos and Young Minorities”

*Leadership survival skills*

---

---

---

---

---

---

---

**Do's and Don'ts of Recruitment**

**DO**

- Talk to them
- Give them different ways to get involved
- Talk about issues in ways relevant to young adults
- Be results-oriented
- Let them know they are part of a movement
- Provide them with flexibility
- Provide positive feedback frequently
- Appeal to their interests
- Listen to them
- Respect their ideas
- Be yourself
- Hold back on the rhetoric
- Have events with high energy and engagement levels
- Make technology your friend
- Plan events where they feel comfortable
- Ask them to attend a meeting and join your club!

*Leadership survival skills*

---

---

---

---

---

---

---

---

**Dos and Don'ts of Recruitment**

**DON'T**

- Stereotype young adults as "kids"
- Assume that young voters know the basics
- Think young Republicans will get involved
- Denigrate young adults
- Invoke anger
- Waste time giving stump speeches with party platitudes or attacks
- Lie to them
- Demean new technology
- Point out their age
- Assume they are all Democrats
- Forget to ask them to attend a meeting and join your club!

*Leadership survival skills*

---

---

---

---

---

---

---

---

**- TFRW Outreach -**  
***Creating Strategic Partnerships to Accomplish Common Goals***

Kim Chambers  
 512-507-3668  
 KimCham@gmail.com

*Leadership survival skills*

---

---

---

---

---

---

---

---

## **Ways to Attract New Members**

### **PROGRAMS**

#### Content

- Feature high-profile females (*former and current elected officials, successful businesswomen, impactful public servants, TV anchors/personalities, etc.*)
- Plan dynamic programs that will appeal to all women and encourage even non-political women to attend (*healthcare, leadership, education, local issue's, etc.*)
- Highlight special events and celebrations that provide a unique opportunity to invite guests – (*daughters in May, veterans in November, students in September, spouses in February, precinct chairmen in April, service men and women in July, fellow church or synagogue members in December, etc.*)

#### Timetable

Allow time for members to network so business women can promote their business/company – a sign of appreciation to them for making time to attend!

#### Day and time

Business lunch – stay on time!

Night event w/dinner – can bring couples

Happy hour event – attract younger crowd

Weekend events – working women, moms, students

#### Location

Country club, downtown hotel ballroom, downtown hotspot, campus/suburbs

#### Price Point

Free – everyone likes this especially students, retirees, those on a fixed-income

Different levels of sponsorship for an event – volunteer (free/reduced ticket), silent auction, gold sponsor, acknowledge all contributions!

### **YOUTH**

#### High school

16 year olds can work as poll watchers, block walk, lick envelopes, etc.

Contact local high school groups, Girl Scouts and plan an event

#### College

Contact local GOP college groups and plan an event

Go to high-profile campaign stops at colleges and promote your club

#### Under 30 vote

Get GOP primary voting history in your area for those under 30 and hold an event post-primary (targeted just for them) to follow up on their engagement

## **OTHER REPUBLICANS**

Republican-affiliated organizations – NRA, veteran/military, church, tea party, precinct chairmen

## **PROMOTE**

In the media – press release for upcoming meeting, big events (Convention, fundraiser), highlight members in the spotlight

At your local Republican headquarters – we’re on the same team!

Club brochure – highlight club’s efforts to assist many different groups of women (can use TFRW examples, Republican Party history)

Word of Mouth – engage in your community and lead by example, wear Republican accessories, write “Republican Women Care” or “Donated by the \_\_\_\_ Republican Women” on bags of donated items

## Do's and Don'ts to Recruit Young Women

### DO

- **Talk to them** – Just do it! Stop the cycle of mutual neglect
- **Give them different ways to get involved** – focus on team activities with ambitious goals (work the meeting check-in table with a friend, block walk for a campaign, join a committee to plan an upcoming event, etc.)
- **Talk about issues in ways relevant to young adults** – examples are health care access and cost, not prescription drugs and Medicare; *their* personal share of the national debt; how a high unemployment number adversely affects their ability to enter the job market (lower pay, more competition); higher taxes equate to less money in *their* paycheck; drilling for oil in America equates to lower gas prices, etc.
- **Be results-oriented** and give them a sense that their contribution can make a difference
- **Let them know they are part of a movement** – they want to belong to something bigger than themselves
- **Provide them with flexibility** – tasks, meeting times, levels of involvement
- **Provide positive feedback frequently** – use positive language about their participation and build on their desire to have an impact
- **Appeal to their interests** – themselves!, their families, friends, work
- **Listen to them** – answer their specific concerns and questions. Don't preach to them!
- **Respect their ideas** – utilize them to attract more young adults
- **Be yourself** – you don't need to be "one of the kids" to get their attention
- **Hold back on the rhetoric** – they trust sources they view as unbiased
- **Have events with high energy and engagement levels** – the more you give, the more you get
- **Make technology your friend** – website, Facebook, email, e-newsletter, Flickr, YouTube, text messages, online pay
- **Plan events where they feel comfortable** – where they naturally congregate like popular restaurants, coffee shops, bars, theatres, parks, concerts, rodeo, festivals, campus
- **Ask them to attend a meeting and join your club!** And encourage them to bring a friend!

### DON'T

- **Stereotype young adults as "kids"** – they are politically engaged, savvy and a larger voting bloc than "Seniors"
- **Assume that young voters know the basics** of the political system such as the differences between the Parties, how to register to vote, why capitalism is better than government-run economies (socialism, fascism, communism)

- **Think young Republicans will get involved** just because it is the right thing to do
- **Denigrate young adults** for apathy or low voting rates. Not only is this not true anymore, it can turn them off to your message
- **Invoke anger** – they’re looking for solutions, not complaints
- **Waste time giving stump speeches** with party platitudes or attacks – they want ideas and action, not attack ads and soundbites
- **Lie to them** - they *can* handle the truth and respect you for telling them
- **Demean new technology** like Facebook/Twitter – it’s their means of communication. Remember, most of them don’t remember a world without the Internet!
- **Point out their age** – yes they are young, but their vote/contribution counts just as much as anyone else
- **Assume they are all Democrats** – 43% of young adults in Texas voted for McCain in 2008, 77% of young adults in Texas consider themselves to be “conservative” or “moderate”
- **Forget to ask them to attend a meeting and join your club!**

**PROGRAMS  
ESSENTIALS  
TO KEEP IN YOUR  
BACKPACK**

Rachel Woods  
Vice President of Programs  
*Texas Federation of Republican Women*



---

---

---

---

---

---

---



**TFRW HANDBOOK**

---

---

---

---

---

---

---

**A MAP**

- A Calendar
  - Community
  - Club
  - Election
- TFRW John Goodwin Tower Awards Checklist



---

---

---

---

---

---

---



**PROGRAMS CHECKLIST**

---

---

---

---

---

---

---

---

**PHONE/STATIONERY**

---

---

---

---

---

---

---

---

**A HELPFUL FRIEND'S  
PHONE NUMBER**

Rachel Woods, VP of Programs  
Texas Federation of Republican Women  
254-723-7633

---

---

---

---

---

---

---

---



## **IS YOUR PROGRAM “R.E.M.?”**

### **Rachel Woods, Vice-President of Programs**

#### **What is “R.E.M.?”**

No, “R.E.M.” does not stand for a state of sleep in which you want your members during meetings. There will be no time for sleep in 2012. We have a country to save! “R.E.M.” is a recipe for a great program. “R.E.M.” is an acronym that means, “relevant, educational and motivating.” You can determine whether a program idea is right for your meeting by determining if it is:

- **Relevant – Is your program timely?** Consider the current objectives of your organization and determine whether the program is in line with your mission. Plan ahead for programs that will help your organization to achieve its objectives.
- **Educational – What will your members learn?** Will your members gain needed perspective, receive insight to help them make better decisions or learn what specific action to take?
- **Motivating – Does your program motivate your members to take action?** It should. We are a Political ACTION Committee. Let’s put the ACTION in PAC by motivating our members to take action this election season.

### **JANUARY TIPS FOR “R.E.M.” PROGRAMS**

- Look at the TFRW John Goodwin Tower Awards Checklist immediately. This checklist was developed to encourage clubs to achieve their missions by rewarding ACTION that meets organizational objectives. The checklist indicates the types of programs that will be relevant during the 2012 Election Year. The Programs Chairman and Awards Chairman should work closely.
- Make an annual calendar for your club that includes Victory 2012 goals and election deadlines, holidays, etc., to help you see the year at a glance. This will help you to determine what information your members will need each month. Developing a calendar is the first step in making a strategic plan for victory in November. Your programs should be strategically linked to your short-term and long-term goals.
- Ideas for “relevant” programs:
  - Provide a club orientation for all members reviewing your organization’s mission and the history of NFRW, TFRW and your local club.
  - Arrange for a Republican Primary Candidate Forum. This can be at your regular meeting time or, if you think you will have better attendance, perhaps a night time meeting.
  - Have a program on Convention Procedure to ensure your members know how to become involved in the convention process at the grassroots level. This is crucial because it is where platform issues begin and delegates are chosen for County/SD Conventions and ultimately the State Convention. We want our TFRW members represented well at the state convention, since we represent the largest auxiliary in the state.
  - Once the Primary is over we must make every effort to invite our Primary Republican winners back to our clubs to demonstrate our unity. We must stand united behind our Republican candidates as we head into the general election.
- Mark Your Calendar for February 4, 2012 TFRW Leadership Survival Skills Camp in Austin! This will be a great opportunity to learn and network with other Republican women. At that time, the Awards Calendar will be distributed.

**Contact: Rachel Woods, TFRW Vice President Programs**  
254-723-7633 [GOPUnited@aol.com](mailto:GOPUnited@aol.com)

# PROGRAMS CHECKLIST ☒

## ☐ Program Selection

- Seek diverse perspective for quality programs aligned with your long-term and short-term organizational goals and objectives
- Consult with your president to learn meeting goals and agenda
- Program Criteria: “R.E.M.” (Relevant, Educational and Motivating)

## ☐ Invite Speaker(s) to Your Meeting

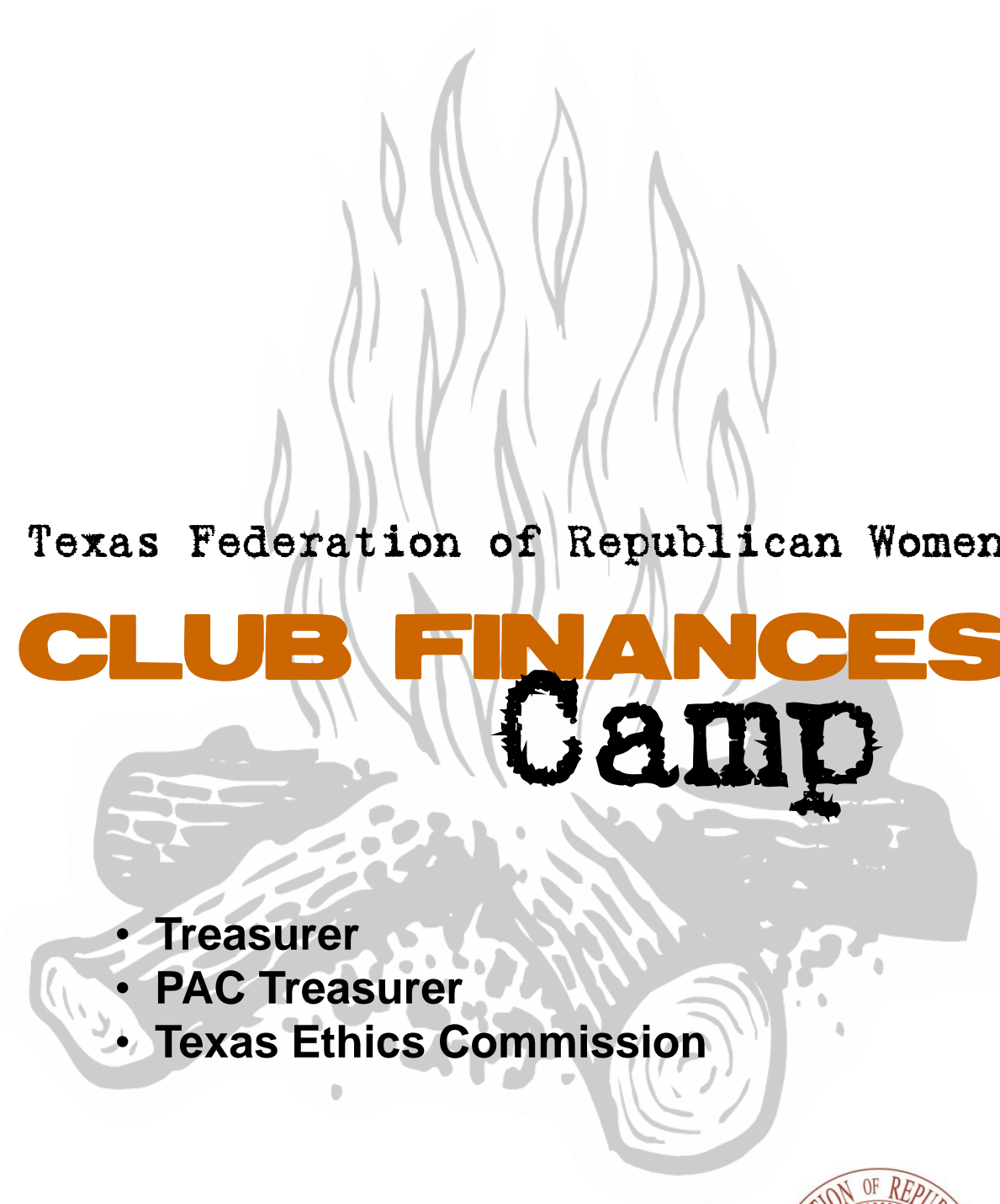
- How formal should the invitation be? Is there an event request form requirement? Who handles the speaker’s schedule?
- Invite the speaker. Strive to give at least 3 weeks’ notice.
- Make sure to provide the date, time, location, amount of time allowed for the speaker. Ask if the speaker wants to include Q&A. If so, build this into his/her time allocation.
- Should he/she accept:
  - Determine who will be your contact for the speaker on the day of the training.
  - Request latest bio and picture.
  - Request information about any special needs, tech needs, etc.
  - Confirm the speaker the week of the event.
  - Provide the speaker with a map and directions should he/she need it.

## ☐ Event Day Logistics

- Coordination of on-site logistics and arrangements for the speaker
- Make sure you contact information for the speaker or his/her representative and that they have yours should they need to call you
- Print a copy of the speaker’s bio for the speaker’s introduction
- Will your organization give the speaker a gift?
  - Ideas on a dime: Donate an approved book to your local library in the speaker’s name, donate to the non-profit in the name of the speaker, donate to TFRW in the speaker’s name (you get points for this), etc. (Check your rules before you give gifts to a federal official or candidate)

## ☐ Give Thanks on Behalf of Your Club

- Determine how the president prefers this to be done. Sometimes the president prefers to do this on special club letterhead or stationery. Do not assume it has been done. Your job is complete when the thank you is received.



Texas Federation of Republican Women

# **CLUB FINANCES**

## **Camp**

- Treasurer
- PAC Treasurer
- Texas Ethics Commission



# **Treasurer: Taxes, Records and Reports**

**Cynthia England, TFRW Treasurer  
281.389.6536**

## **A. Taxes – Reporting**

**Federal employee identification numbers (EIN)** – Since 9/11 federal EIN numbers have been required for all bank accounts in the US. Clubs should keep on file a letter or form from the IRS reflecting their assigned EIN number. This will be required any time you change bank accounts.

**Texas Franchise Taxes** – Senate Bill 1, 82<sup>nd</sup> Legislature, 1<sup>st</sup> Called Session, Article 45 has added unincorporated political committees to the list of entities that are not subject to the Texas Franchise Tax. This is effective for reports originally due on or after January 1, 2012 (for clubs with years ending during 2011).

**Texas Sales & Use Taxes** – Under Texas Sales Tax laws, any items considered to be taxable in the State of Texas that are sold or auctioned by a TFRW club is subject to Texas Sales Tax. Clubs can set their price to include sales tax and then ‘back out’ the sales taxes for reporting purposes. Clubs holding these kinds of fundraisers are required to hold a Texas Sales Tax permit.

**IRS Form 1120-POL** – Only clubs earning interest or dividends in excess of \$100 per year are required to file form 1120-POL.

**IRS Form 990** – Only clubs whose receipts are more than \$50,000 per year (based on a three year rolling average) are required to file form 990.

**IRS Form 8871** – In order to elect to be exempt from federal income taxes under IRS Code Section 527, clubs are required to file form 8871 and then must file an amended form 8871 each time the club’s officers change.

**Letter from Texas Comptroller of Public Accounts** – TFRW has received a letter for the Texas Comptroller’s Exempt Organization section outlining the reasons we are subject to Texas Sales tax laws and Texas Franchise tax laws.

Other Information you might find useful:

Reporting Dates

Year End/Transitional dates (from the January President's Newsletter)

Forms, Examples Worksheets and Hints

Difference in nonprofit and tax-exempt

Navigating the Numbers (list of the various IRS forms)

Examples of how to complete (SS4, AP-224)

Worksheets (Sales Tax and Franchise tax)

Fundraising Ideas – Sales Tax and PAC Issues

Information needed for form 8871

Annual Financial Review

Annual Financial Review Checklist

Example of reporting findings from the annual financial review

Budgeting and recordkeeping for Clubs

## **What is the difference between nonprofit and tax-exempt status?**

Nonprofit status is a state law concept. Nonprofit status may make an organization eligible for certain benefits, such as state sales, property and income tax exemptions. Although most federal tax-exempt organizations are nonprofit organizations, organizing as a nonprofit organization at the state level does not automatically grant the organization exemption from federal income tax. To qualify as a tax-exempt nonprofit you must generally have charitable or social improvement functions. To qualify as exempt from federal income tax, an organization must meet requirements set forth in the Internal Revenue Code. Political Organizations do not qualify as nonprofits but are tax exempt under different rules. See Types of Tax-Exempt Organizations or Publication 557 for more information.

## **Exemption Requirements - Political Organizations**

A political organization subject to section 527 is a party, committee, association, fund, or other organization (whether or not incorporated) organized and operated primarily for the purpose of directly or indirectly accepting contributions or making expenditures, or both, for an exempt function.

A political organization must be organized for the primary purpose of carrying on exempt function activities. A political organization's primary activities must be exempt function activities. A political organization may engage in activities that are not exempt function activities, but these may not be its primary activities.

To be exempt, a political organization must file a timely notice with the IRS that it is to be treated as a tax-exempt organization.

## **NAVIGATING THE NUMBERS**

**(Do these form number make you crazy?)**

Don't people who work with tax returns always seem to speak in a coded shorthand made up of numbers that make no sense to anyone else. So I am trying to give you the code sheet to work from.

### For the Texas Ethics Commission

#### **Form AGTA**

This is the form filed immediately after your club changes its PAC Treasurer (for most clubs this occurs on January 1<sup>st</sup> of each year).

#### **Form GPAC**

This is the TEC form filed online by your PAC treasurers showing your club revenues and contributors names and addresses and your Expenses with vendors names and addresses.

### For the Texas Comptroller

#### **On Line**

This is to report name and address after a change of Treasurer for the club if your club has a Texas Sales and Use Tax permit

#### **Sales & Use Tax**

This return is filed if your club sells any merchandise (at a booth or at a silent auction)

#### **Franchise Tax**

This is the Texas Franchise Tax. Unincorporated clubs are no longer required to file Texas Franchise Taxes.

### For the Internal Revenue Service

#### **SS-4**

Filed by each new club, this is the application requesting a federal tax identification number.

#### **8822**

This is a name and address change form that should be filed each time a club's officers change.

#### **8871**

Filed by any club whose gross revenues exceed \$25,000. This form is not required until a clubs revenues pass the \$25,000 mark but then must be filed within 30 days of passing that amount. Failure to file this could cause a loss of a club's tax exempt status.



8871-Amended

This amended form is also supposed to be filed each time there is a change in club Treasurer. Failure to file this amendment could cause the loss of a club's tax exempt status under Section 527 and forcing the club to file Form 8872 each year no matter how small the club's revenues are.

1120-POL

This tax return filed by clubs having more than \$100 in interest income (non-exempt function income) each year.

990-N

This was the new notice sent out by the IRS to all non-profits, also called the E-postcard. **In March the Exempt Organization group at the IRS agreed to post a notice on its website that Section 527 organizations are not required (or allowed) to file the 990-N but may be required in the future**

990

This tax return is filed by clubs having more than \$50,000 in average gross income each year.

990-EZ

This return may be filed by clubs having more than \$50,000 but less than \$100,000 in average gross income each year.

If you have any questions about these forms or need any assistance in completing these forms, please feel free to contact me directly:

Cynthia England, CPA  
TFRW Treasurer 2010 - 2013  
281-389-6536 (cell)  
Email: [clengland@sbcglobal.net](mailto:clengland@sbcglobal.net)

(Revised 01.19.2012)

# Application for Employer Identification Number

(For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)

OMB No. 1545-0003

EIN

▶ See separate instructions for each line. ▶ Keep a copy for your records.

Type or print clearly.

1 Legal name of entity (or individual) for whom the EIN is being requested <b>YOUR LOCAL REPUBLICAN WOMEN</b>																	
2 Trade name of business (if different from name on line 1)	3 Executor, administrator, trustee, "care of" name																
4a Mailing address (room, apt., suite no. and street, or P.O. box) <b>OFFICER'S ADDRESS</b>	5a Street address (if different) (Do not enter a P.O. box.)																
4b City, state, and ZIP code (if foreign, see instructions) <b>ANYWHERE, TX 77007</b>	5b City, state, and ZIP code (if foreign, see instructions)																
6 County and state where principal business is located <b>HARRIS COUNTY, TEXAS</b>																	
7a Name of principal officer, general partner, grantor, owner, or trustor <b>OFFICER'S NAME HERE</b>	7b SSN, ITIN, or EIN <b>462-94-5111</b>																
8a Is this application for a limited liability company (LLC) (or a foreign equivalent)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		8b If 8a is "Yes," enter the number of LLC members ▶															
8c If 8a is "Yes," was the LLC organized in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No																	
9a Type of entity (check only one box). Caution. If 8a is "Yes," see the instructions for the correct box to check. <table border="0"><tr><td><input type="checkbox"/> Sole proprietor (SSN) _____</td><td><input type="checkbox"/> Estate (SSN of decedent) _____</td></tr><tr><td><input type="checkbox"/> Partnership</td><td><input type="checkbox"/> Plan administrator (TIN) _____</td></tr><tr><td><input type="checkbox"/> Corporation (enter form number to be filed) ▶ _____</td><td><input type="checkbox"/> Trust (TIN of grantor) _____</td></tr><tr><td><input type="checkbox"/> Personal service corporation</td><td><input type="checkbox"/> National Guard <input type="checkbox"/> State/local government</td></tr><tr><td><input type="checkbox"/> Church or church-controlled organization</td><td><input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government/military</td></tr><tr><td><input type="checkbox"/> Other nonprofit organization (specify) ▶ _____</td><td><input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises</td></tr><tr><td><input checked="" type="checkbox"/> Other (specify) ▶ <b>POLITICAL ACTION COMMITTEE (I.R.C. SEC. 527)</b></td><td>Group Exemption Number (GEN) if any ▶ _____</td></tr></table>			<input type="checkbox"/> Sole proprietor (SSN) _____	<input type="checkbox"/> Estate (SSN of decedent) _____	<input type="checkbox"/> Partnership	<input type="checkbox"/> Plan administrator (TIN) _____	<input type="checkbox"/> Corporation (enter form number to be filed) ▶ _____	<input type="checkbox"/> Trust (TIN of grantor) _____	<input type="checkbox"/> Personal service corporation	<input type="checkbox"/> National Guard <input type="checkbox"/> State/local government	<input type="checkbox"/> Church or church-controlled organization	<input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government/military	<input type="checkbox"/> Other nonprofit organization (specify) ▶ _____	<input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises	<input checked="" type="checkbox"/> Other (specify) ▶ <b>POLITICAL ACTION COMMITTEE (I.R.C. SEC. 527)</b>	Group Exemption Number (GEN) if any ▶ _____	
<input type="checkbox"/> Sole proprietor (SSN) _____	<input type="checkbox"/> Estate (SSN of decedent) _____																
<input type="checkbox"/> Partnership	<input type="checkbox"/> Plan administrator (TIN) _____																
<input type="checkbox"/> Corporation (enter form number to be filed) ▶ _____	<input type="checkbox"/> Trust (TIN of grantor) _____																
<input type="checkbox"/> Personal service corporation	<input type="checkbox"/> National Guard <input type="checkbox"/> State/local government																
<input type="checkbox"/> Church or church-controlled organization	<input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government/military																
<input type="checkbox"/> Other nonprofit organization (specify) ▶ _____	<input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises																
<input checked="" type="checkbox"/> Other (specify) ▶ <b>POLITICAL ACTION COMMITTEE (I.R.C. SEC. 527)</b>	Group Exemption Number (GEN) if any ▶ _____																
9b If a corporation, name the state or foreign country (if applicable) where incorporated	State	Foreign country															
10 Reason for applying (check only one box) <table border="0"><tr><td><input type="checkbox"/> Started new business (specify type) ▶ _____</td><td><input type="checkbox"/> Banking purpose (specify purpose) ▶ _____</td></tr><tr><td><input type="checkbox"/> Hired employees (Check the box and see line 13.)</td><td><input type="checkbox"/> Changed type of organization (specify new type) ▶ _____</td></tr><tr><td><input type="checkbox"/> Compliance with IRS withholding regulations</td><td><input type="checkbox"/> Purchased going business</td></tr><tr><td><input checked="" type="checkbox"/> Other (specify) ▶ <b>COMPLIANCE WITH IRS REPORTING REQUIREMENTS</b></td><td><input type="checkbox"/> Created a trust (specify type) ▶ _____</td></tr><tr><td></td><td><input type="checkbox"/> Created a pension plan (specify type) ▶ _____</td></tr></table>			<input type="checkbox"/> Started new business (specify type) ▶ _____	<input type="checkbox"/> Banking purpose (specify purpose) ▶ _____	<input type="checkbox"/> Hired employees (Check the box and see line 13.)	<input type="checkbox"/> Changed type of organization (specify new type) ▶ _____	<input type="checkbox"/> Compliance with IRS withholding regulations	<input type="checkbox"/> Purchased going business	<input checked="" type="checkbox"/> Other (specify) ▶ <b>COMPLIANCE WITH IRS REPORTING REQUIREMENTS</b>	<input type="checkbox"/> Created a trust (specify type) ▶ _____		<input type="checkbox"/> Created a pension plan (specify type) ▶ _____					
<input type="checkbox"/> Started new business (specify type) ▶ _____	<input type="checkbox"/> Banking purpose (specify purpose) ▶ _____																
<input type="checkbox"/> Hired employees (Check the box and see line 13.)	<input type="checkbox"/> Changed type of organization (specify new type) ▶ _____																
<input type="checkbox"/> Compliance with IRS withholding regulations	<input type="checkbox"/> Purchased going business																
<input checked="" type="checkbox"/> Other (specify) ▶ <b>COMPLIANCE WITH IRS REPORTING REQUIREMENTS</b>	<input type="checkbox"/> Created a trust (specify type) ▶ _____																
	<input type="checkbox"/> Created a pension plan (specify type) ▶ _____																
11 Date business started or acquired (month, day, year). See instructions. <b>JANUARY 1, 2008</b>		12 Closing month of accounting year <b>DECEMBER</b>															
13 Highest number of employees expected in the next 12 months (enter -0- if none). <table border="1"><tr><td>Agricultural <b>0</b></td><td>Household <b>0</b></td><td>Other <b>0</b></td></tr></table>		Agricultural <b>0</b>	Household <b>0</b>	Other <b>0</b>	14 Do you expect your employment tax liability to be \$1,000 or less in a full calendar year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If you expect to pay \$4,000 or less in total wages in a full calendar year, you can mark "Yes.")												
Agricultural <b>0</b>	Household <b>0</b>	Other <b>0</b>															
15 First date wages or annuities were paid (month, day, year). Note. If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year) ▶																	
16 Check one box that best describes the principal activity of your business. <table border="0"><tr><td><input type="checkbox"/> Construction</td><td><input type="checkbox"/> Rental &amp; leasing</td><td><input type="checkbox"/> Transportation &amp; warehousing</td><td><input type="checkbox"/> Health care &amp; social assistance</td><td><input type="checkbox"/> Wholesale-agent/broker</td></tr><tr><td><input type="checkbox"/> Real estate</td><td><input type="checkbox"/> Manufacturing</td><td><input type="checkbox"/> Finance &amp; insurance</td><td><input type="checkbox"/> Accommodation &amp; food service</td><td><input type="checkbox"/> Wholesale-other</td></tr><tr><td colspan="3"><input type="checkbox"/> Other (specify) <b>POLITICAL ACTION COMMITTEE</b></td><td><input type="checkbox"/> Retail</td><td></td></tr></table>			<input type="checkbox"/> Construction	<input type="checkbox"/> Rental & leasing	<input type="checkbox"/> Transportation & warehousing	<input type="checkbox"/> Health care & social assistance	<input type="checkbox"/> Wholesale-agent/broker	<input type="checkbox"/> Real estate	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Finance & insurance	<input type="checkbox"/> Accommodation & food service	<input type="checkbox"/> Wholesale-other	<input type="checkbox"/> Other (specify) <b>POLITICAL ACTION COMMITTEE</b>			<input type="checkbox"/> Retail	
<input type="checkbox"/> Construction	<input type="checkbox"/> Rental & leasing	<input type="checkbox"/> Transportation & warehousing	<input type="checkbox"/> Health care & social assistance	<input type="checkbox"/> Wholesale-agent/broker													
<input type="checkbox"/> Real estate	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Finance & insurance	<input type="checkbox"/> Accommodation & food service	<input type="checkbox"/> Wholesale-other													
<input type="checkbox"/> Other (specify) <b>POLITICAL ACTION COMMITTEE</b>			<input type="checkbox"/> Retail														
17 Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided. <b>POLITICAL ACTIVITIES</b>																	
18 Has the applicant entity shown on line 1 ever applied for and received an EIN? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," write previous EIN here ▶																	

Third Party Designee	Complete this section only if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of this form.		
	Designee's name	Designee's telephone number (include area code) ( )	
	Address and ZIP code	Designee's fax number (include area code) ( )	
	Applicant's telephone number (include area code) ( 713 ) 622-9999		
Signature ▶		Date ▶	Applicant's fax number (include area code) ( 713 ) 622-8888

Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.

Name and title (type or print clearly) ▶ **OFFICER'S NAME, OFFICER'S TITLE**

## Do I Need an EIN?

File Form SS-4 if the applicant entity does not already have an EIN but is required to show an EIN on any return, statement, or other document.<sup>1</sup> See also the separate instructions for each line on Form SS-4.

IF the applicant...	AND...	THEN...
Started a new business	Does not currently have (nor expect to have) employees	Complete lines 1, 2, 4a-8a, 8b-c (if applicable), 9a, 9b (if applicable), and 10-14 and 16-18.
Hired (or will hire) employees, including household employees	Does not already have an EIN	Complete lines 1, 2, 4a-6, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10-18.
Opened a bank account	Needs an EIN for banking purposes only	Complete lines 1-5b, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Changed type of organization	Either the legal character of the organization or its ownership changed (for example, you incorporate a sole proprietorship or form a partnership) <sup>2</sup>	Complete lines 1-18 (as applicable).
Purchased a going business <sup>3</sup>	Does not already have an EIN	Complete lines 1-18 (as applicable).
Created a trust	The trust is other than a grantor trust or an IRA trust <sup>4</sup>	Complete lines 1-18 (as applicable).
Created a pension plan as a plan administrator <sup>5</sup>	Needs an EIN for reporting purposes	Complete lines 1, 3, 4a-5b, 9a, 10, and 18.
Is a foreign person needing an EIN to comply with IRS withholding regulations	Needs an EIN to complete a Form W-8 (other than Form W-8ECI), avoid withholding on portfolio assets, or claim tax treaty benefits <sup>6</sup>	Complete lines 1-5b, 7a-b (SSN or ITIN optional), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Is administering an estate	Needs an EIN to report estate income on Form 1041	Complete lines 1-6, 9a, 10-12, 13-17 (if applicable), and 18.
Is a withholding agent for taxes on non-wage income paid to an alien (i.e., individual, corporation, or partnership, etc.)	Is an agent, broker, fiduciary, manager, tenant, or spouse who is required to file Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	Complete lines 1, 2, 3 (if applicable), 4a-5b, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10 and 18.
Is a state or local agency	Serves as a tax reporting agent for public assistance recipients under Rev. Proc. 80-4, 1980-1 C.B. 581 <sup>7</sup>	Complete lines 1, 2, 4a-5b, 9a, 10 and 18.
Is a single-member LLC	Needs an EIN to file Form 8832, Classification Election, for filing employment tax returns, or for state reporting purposes <sup>8</sup>	Complete lines 1-18 (as applicable).
Is an S corporation	Needs an EIN to file Form 2553, Election by a Small Business Corporation <sup>9</sup>	Complete lines 1-18 (as applicable).

<sup>1</sup> For example, a sole proprietorship or self-employed farmer who establishes a qualified retirement plan, or is required to file excise, employment, alcohol, tobacco, or firearms returns, must have an EIN. A partnership, corporation, REMIC (real estate mortgage investment conduit), nonprofit organization (church, club, etc.), or farmers' cooperative must use an EIN for any tax-related purpose even if the entity does not have employees.

<sup>2</sup> However, do not apply for a new EIN if the existing entity only (a) changed its business name, (b) elected on Form 8832 to change the way it is taxed (or is covered by the default rules), or (c) terminated its partnership status because at least 50% of the total interests in partnership capital and profits were sold or exchanged within a 12-month period. The EIN of the terminated partnership should continue to be used. See Regulations section 301.6109-1(d)(2)(iii).

<sup>3</sup> Do not use the EIN of the prior business unless you became the "owner" of a corporation by acquiring its stock.

<sup>4</sup> However, grantor trusts that do not file using Optional Method 1 and IRA trusts that are required to file Form 990-T, Exempt Organization Business Income Tax Return, must have an EIN. For more information on grantor trusts, see the instructions for Form 1041.

<sup>5</sup> A plan administrator is the person or group of persons specified as the administrator by the instrument under which the plan is operated.

<sup>6</sup> Entities applying to be a Qualified Intermediary (QI) need a QI-EIN even if they already have an EIN. See Rev. Proc. 2000-12.

<sup>7</sup> See also *Household employer* on page 4 of the instructions. **Note.** State or local agencies may need an EIN for other reasons, for example, hired employees.

<sup>8</sup> Most LLCs do not need to file Form 8832. See *Limited liability company (LLC)* on page 4 of the instructions for details on completing Form SS-4 for an LLC.

<sup>9</sup> An existing corporation that is electing or revoking S corporation status should use its previously-assigned EIN.



## SALES TAX WORKSHEET

Using 8.25% as your tax rate.

(a) TOTAL SALES FOR EVENT

To compute taxable sales divide (a) by 1.0825.

\_\_\_\_\_ / 1.0825 = \_\_\_\_\_

(b) TAXABLE SALES

Sales tax collected is (b) x .0825

\_\_\_\_\_ x .0825 = \_\_\_\_\_

On your sales tax form you will then calculate the sales tax.

You will also be allowed to calculate a discount for timely payment on the form.

# EXAMPLE

At your event you raised \$1875.00 from your silent auction.

## SALES TAX WORKSHEET

**~ EXAMPLE ~**

Using 8.25% as your tax rate.

**(a) TOTAL SALES FOR EVENT**

**\$ 1,875.00**

To compute taxable sales divide (a) by 1.0825.

$$\underline{1875.00} / 1.0825 = 1732.10$$

**(b) TAXABLE SALES**

**\$ 1,732.10**

Sales tax collected is (b) x .0825

$$1732.10 \times .0825 = 142.90$$

On your sales tax form you will then calculate the sales tax.

You will also be allowed to calculate a discount for timely payment on the form.

Your taxable sales are \$1732.10 and you will show sales taxes of \$142.90 on your sales tax return.

## TEXAS FRANCHISE WORKSHEET

For filing Texas Franchise taxes - the year you file is based on the prior years income and dues. For example - 2010 Franchise tax is based on an accounting year that runs from January 1, 2009 through December 31, 2009.

(a) TOTAL DEPOSITS FOR THE YEAR

The easiest way to compute this number is to add the deposits shown on your bank statements from Jan to Dec.

This number becomes your gross receipts for the year.

Jan	
Feb	
Mar	
Apr	
May	
Jun	
Jul	
Aug	
Sep	
Oct	
Nov	
Dec	
Total	

(attachment C1)

## Fundraising Ideas – Sales Taxes & PAC Issues

We have received numerous questions regarding fundraising and how our PAC status affects what we can do to raise money. There are many ways to fill our coffers that are legal and conform to PAC requirements as well. Fundraising methods have not changed, but reporting on the fundraising has become more challenging with our PAC status.

Because we're PACs, we do have to keep track of every dollar we receive, but there are fairly simple ways to do that using either sales receipts or something similar to a sign-in sheet, where contributors can record their name, address, occupation, and date & amount of contribution. For PAC purposes, all funds we receive are considered contributions, whether they are for dues, luncheons, items purchased from the club, or a major fundraising event. **Even though we must report the funds as contributions, they may also be considered as taxable sales and sales tax must be reported and paid to the State of Texas.**

**Tracking contributions and reporting** them on a timely basis are of utmost importance.

PAC-related requirements are:

- We cannot accept, under ANY circumstances, cash, checks, or contributions of any kind from corporations.
- We can accept cash, but must know the source of ALL cash received. You'll probably find that limiting your receipts to checks whenever possible will simplify your record keeping.
- We must know and report the date and amount of each contribution and the name, address, and occupation of EVERY person or entity that gives us cash, checks, or contributions in kind.

Be sure that your fundraising solicitations have a disclaimer that states something to the effect, "Political advertising paid by Hometown Republican Women PAC" and also a statement such as, "Contributions are not deductible for Federal Income Tax purposes."

We have always been responsible for collecting and paying sales tax on any sales made by our local units. This includes sales of donated items, logo items, and live or silent auctions. Contact your local State Comptroller's branch office for more information on collecting and paying Texas Sales and Use tax or call **Cynthia England at 281-389-6536**.

**Moneymaking projects** can range from a simple bake sale to a \$1,000 per plate dinner. Whatever you've done legally in the past is still legal now that you're a PAC. **Please note that sales of baked good are specifically excluded from sales taxes but the sale of a meal is subject to sales taxes.**

Bear in mind that raffles have never been permissible for Republican Women's groups. Whether they are called "opportunity tickets" or door prizes to non-events, they are not and never have been legal. Only charitable organizations such as churches are allowed to conduct raffles, and there are very strict regulations for this type of fundraising.

Listed below are some fundraising ideas that will be published in the new Leadership Handbook.

1. **Elephant Boutiques:** Members donate (report all donations of items for sale as an in-kind donation on your PAC report) handmade items or purchase gifts, such as jewelry, to be sold. The "gift shop" can be set up at meetings, state conventions and workshops. **Sales of gift type items are always subject to sales taxes.**
2. **Kitchen Corner:** This is a glorified bake sale, featuring fancy baked goods, candles, and other food specialties (report all donations of items for sale as an in-kind donation on your PAC report). Sales can be held almost anytime, but they produce the best results before holidays, in a good location and attractively displayed. Pricing is important - don't price too low.  
**Only the baked goods and items classified as food are excluded from sales taxes, all other kitchen items sold are subject to sales taxes.**
3. **County Fair:** Republicans usually have a booth where literature is on display for free distribution. Your unit could sell handmade items (report all donations of items for sale as an in-kind donation on your PAC report) such as tote bags, crocheted elephants and ceramic pieces. Your unit might offer to sell items made by senior citizens or handicapped persons, thus performing a desirable community service by providing income for these individuals while raising funds for your unit. Be sure to keep a good supply of voter registration cards and membership sign ups for newcomers. **The sale of the handmade items, even if made by senior citizens or the disable will be subject to sales taxes.**



4. **White Elephant Sale:** The white elephant sale or auction is enjoyable and easy to manage. Members and other contributors are asked to donate merchandise (report all donations of items for sale as an in-kind donation on your PAC report) worth about \$1 or \$2 attractively packaged in bright gift-wrap. When auctioned off, most items go for about \$4 or \$5. What makes a white elephant sale fun is the "surprise" that comes with each purchase. **The sale or auction of these donated items will still be subject to sales taxes.**
5. **Thrift Sales (Rummage or Garage Sales):** Handicrafts, baked goods, used home furnishings and even donated designer clothes are among the items that may be offered (report all donations of items for sale as an in-kind donation on your PAC report). The key to a successful sale is simple - membership participation, planning, publicity, and a good location. Garage sales frequently bring in several hundred dollars in an afternoon. **Because Republican Women's clubs are political organizations, we are required to charge sales taxes on the sales of all items not excluded from sales taxes in the Texas Tax Code.**
6. **Patchwork Sales:** You may combine plain squares with colored printed squares to make a patch work banner, scarf, pillow top, napkins, carry-all bag, "picture", apron, etc. The plain squares of material may have an elected official's signature or autograph on them (which should be signed with a waterproof ink pen). (Report all donations of items for sale as an in-kind donation on your PAC report) Decide what the items you wish to make will be, and how many in order to determine how many signatures you will need. In purchasing the materials, you must be sure that the cloth can be written on with ink that will not spread or smear into the fabric. Cut the number of fabric squares you will need. Send one or more to each official whose signature you want, along with a waterproof pen and a cover letter explaining the reason for your request. Also include a self-addressed, stamped envelope for return to you. When all are returned, gather those who sew and proceed to make the items. Items will then be auctioned at a party, luncheon, or meeting. **The auction is a sale and these type items would be subject to sales taxes.**
7. **Buttons and Bumper Stickers:** These items can be purchased and sold for Republican candidates. Standard Republican pins, bumper stickers and jewelry also fit this description. A club can probably make arrangements with manufacturers or wholesalers for GOP memorabilia. **NOTE: Limit these items to state and local candidates and remember to charge sales taxes on each sale.**
8. **Silent Auction:** In this enjoyable game, members contribute attractive gifts (report all donations of items for sale as an in-kind donation on your PAC report). Items are not wrapped and are placed in a convenient area for viewing. A slip of paper and pencil are placed in front of each item. Prospective buyers write their name and bid on the paper. At the conclusion, the highest bidder purchases each article. Be sure to report the fair market value of the donated silent auction items as contributions-in-kind. **NOTE: silent auctions are subject to state sales taxes.**
9. **Live Auctions:** Held in conjunction with a special event such as a dinner or picnic. Invite a special guest to be your auctioneer. Remember contributed items must be accounted for as contribution in kind. **NOTE: live auctions are subject to state sales taxes.**
10. **Sustaining Members or Patrons:** Almost every organization has patrons; i.e., members who contribute an amount above the charge for regular dues. The amount is usually a minimum of \$10.00 above regular dues, but you may have patrons who contribute from \$25.00 to \$100.00 over regular dues. The soliciting is done by direct contact or direct mailings. If by mail, the letter should indicate clearly the purpose and what, if anything, the contributor will receive in return. "Who" sends or signs the request is important - try to have someone known and well respected. Of course, your organization in itself will attract contributions. **Another type of donation and is not subject to sales taxes.**
11. **Boosters:** On official letterhead, a one-page letter is hand addressed to Republican sympathizers, with a personal postscript and a colored card enclosed, describing your activities during the previous year and asking for a small donation. The closing paragraph typically reads: "We are asking you for \$5.00 ...or more if you would like. We are asking you to become a Booster of our organization. When you send us a donation of \$5.00 or more, we will send you a card, which reads, "I am a Booster of \_\_\_\_\_ Republican Women". **Recognition of a donor and is not subject to sales taxes.**
12. **Plant Fair:** Houseplants being very popular, the opportunity to raise money with houseplants should not be overlooked. Plant sales may be combined with other activities. (Report all donations of items for sale as an in-kind donation on your PAC report) **The sales of plants are subject to sales taxes.**
13. **Walkathon:** Participants get sponsors, who contribute an amount for each mile the participant walks. Special recognition can also be given to those who secure the highest contributions and complete the walk. There are checkpoints along the route, where the participants' cards are initialed and first aid stations are available. People of all ages enjoy participating, especially the young. Those on the walk can wear campaign pins, banners, etc. Candidates can also add to the publicity by participating or attending a get-together party at the end of the walk. A "bike-a-thon" works on the same basis. **Another type of donation and is not subject to sales taxes.**
14. **Special Event Dinners:** Dinners with a special theme such as Lincoln Day, Presidents Day, or just a fundraiser. Have a "named speaker". Plan to have different categories for ticket sales, from Underwriter, Host, Sponsor, to

normal ticket price. Your top categories could entail some of the following; having a special reception, pictures taken individually with the "named speaker", reserved seating, their names and categories listed on the invitation, etc. **The rules on these events vary based on the specific structure of each event.**

- 15. Special theme events:** Barbecues, picnics, potluck meals, chili cook-offs, or boxed meals provided by members and auctioned off. These events can be planned around Holidays as well from 4th of July to Memorial Day. **The rules on these events vary based on the specific structure of each event.**
- 16. Coffees or High Teas.** You can serve different brands of coffee or teas. **This would be treated the same as a meal and would be subject to sales taxes.**
- 17. Home, Garden or Historical Site Tours:** Your organization sponsors the tour or rents a bus and sells tickets for either members or non-member participation. **Another type of donation and is not subject to sales taxes.**
- 18. Special Projects:** Preparation of a special collection of recipes placed into cookbook format. Collect favorite recipes from members or elected officials. **The sale of cookbooks is subject to sales taxes.**
- 19. Advertisement in your newsletter.** Sell advertisement space in your newsletter. Local officials or candidates would be excellent prospects as well as local merchants who are not corporations. **Another type of donation and is not subject to sales taxes.**
- 20. Associate Members:** Recruit Associate members. Your unit does not need to pay NFRW or TFRW dues for any associate member. Their participation adds to your attendance and their volunteer hours may be counted and credited toward your units' total time. Their dues are pure profit. **Another type of donation and is not subject to sales taxes.**

Be sure that prospective purchasers of your goods and services clearly understand that they are making POLITICAL CONTRIBUTIONS. This is obvious if the fundraising is done at regular unit meetings or special events. It is also easier to track contributors in the controlled environment of unit activities. In venues open to the public, it must be clear that funds raised support your unit and its political activities.

**Cynthia England, TFRW Treasurer 2010 - 2013**

[clengland@sbcglobal.net](mailto:clengland@sbcglobal.net)

281-389-6536

# Section 527 Political Organizations Revised Tax Filing Requirements

FS-2002-13, November 2002

Legislation adopted in 2002 altered filing requirements for certain political organizations that seek tax-exempt status under section 527 of the Internal Revenue Code. The new law generally reduces filing requirements for certain state/local political organizations that already disclose certain information to state agencies. In addition, the law relieves some political organizations from filing an annual income tax return or an annual information return. Except where noted, the revised filing requirements are retroactive to July 1, 2000. This fact sheet discusses the current filing requirements as revised by the new legislation and announced in a Nov. 21, 2002 [IRS news release](#). FS-2002-11, published May 2002, is superseded.

The new law:

- Exempts state and local candidate and party committees from filing Form 8871 and Form 990 (or 990-EZ);
- Exempts qualified state and local political organizations (QSLPOs) (as defined below) from filing Form 8872;
- Exempts political committees filing with the FEC from filing Form 990 (or 990-EZ);
- Exempts political organizations that are a caucus or association of state or local officials from filing Form 990 (or 990-EZ);
- Requires additional information on Form 8871 and Form 8872;
- Requires the filing of an amended Form 8871 after material changes to maintain tax-exempt status;
- Increases reporting thresholds for certain Form 990 filers;
- Eliminates the requirement to file Form 1120-POL except where an organization has taxable income after taking the \$100 specific deduction (returning to pre-July 2000 requirements);
- Reinstates the pre-July 2000 confidentiality requirement for any Form 1120-POL filed after November 2, 2002; and
- Changes the electronic filing requirements by
  - Requiring that Form 8871 be filed electronically (as opposed to both in writing and electronically); and
  - Requiring that any Form 8872 due after June 30, 2003, be filed electronically if the filing organization has or expects to have contributions or expenditures of more than \$50,000 during the calendar year.

## Definition of Political Organization

Political organizations are organized and operated primarily to accept contributions and make

expenditures for the purpose of influencing the “selection, nomination, election, or appointment of any individual to Federal, State, or local public office or office in a political organization, or the election of Presidential electors.” Political organizations include political party committees, Federal, State and local candidate committees and other political committees such as political action committees (PACs).

The law also creates a new sub-category of political organization -- qualified state or local political organization (QSLPO). A state or local organization may be a QSLPO, if it meets the following criteria:

- All of its political activities relate solely to state or local public office (or office in a state or local political organization),
- It is subject to state law that requires it to report (and it does report) to a state agency information about contributions and expenditures that is similar to the information that the organization would otherwise be required to report to the IRS,
- The state agency and the organization make the reports publicly available, and
- No Federal candidate or office holder controls it or materially participates in its direction, solicits contributions for it, or directs any of its disbursements.

### **Filing Categories**

Federal tax law divides political organizations into several different categories, and provides different filing requirements for each category. See the first chart below for the filing requirements for each category.

#### **Federal organizations**

- **FEC political committee:** A political organization (including federal candidate committees, political party committees and PACs) that is required to report as a political committee under the Federal Election Campaign Act.
- **Other federal political organization:** A political organization attempting to influence federal elections that is not required to report as a political committee under the Federal Election Campaign Act.

#### **State and Local organizations**

- **Candidate committee:** A campaign committee of a state or local candidate.
- **Party committee:** A state or local committee of a political party.
- **Qualified state or local political organization (QSLPO):** See above definition.
- **Caucus or association:** A group of state or local officials attempting to influence elections.
- **Other political organization:** Any other state or local political organization.

### **Filing Requirements**

The filing requirements in the chart below apply to those political organizations that:

- Wish to be a tax-exempt political organization, and
- Receive or expect to receive \$25,000 or more in gross receipts in any taxable year.

If You Are A	You May Be Required To File
FEC political committee, state or local candidate committee or state or local committee of a political party	<ul style="list-style-type: none"> <li>• Form 1120-POL</li> </ul>
Qualified state or local political organization (QSLPO)*	<ul style="list-style-type: none"> <li>• Form 8871;</li> <li>• Form 1120-POL; and</li> <li>• Form 990</li> </ul>
Caucus or association of state or local officials*	<ul style="list-style-type: none"> <li>• Form 8871;</li> <li>• Form 8872; and</li> <li>• Form 1120-POL</li> </ul>
Any other political organization, including other federal political organizations and other state or local political organizations	<ul style="list-style-type: none"> <li>• Form 8871;</li> <li>• Form 8872;</li> <li>• Form 1120-POL; and</li> <li>• Form 990 or Form 990-EZ</li> </ul>
*An organization may be both a QSLPO and a caucus or association of state or local officials. If so, it is not required to file Form 8872 and Form 990.	

**NOTE:** If you are:

- A political organization that is not tax-exempt, or
- A tax-exempt political organization that does not have gross receipts of at least \$25,000

You must file Form 1120-POL if you have taxable income after taking the \$100 specific deduction for any taxable year.

#### **Description of Form Filing Requirements**

##### **1. Form 8871 – Notice of 527 Status**

Unless excepted (see chart below), a political organization must file Form 8871, *Political Organization Notice of 527 Status*, with the IRS to be tax-exempt. Until it files the form, its income (including contributions) is subject to taxation. Form 8871 must be filed electronically, within 24 hours of the political organization's establishment. An amended Form 8871 must be filed within 30 days of any material change (including termination), or any income (including contributions) it receives after the material change will be subject to taxation.

##### **2. Form 8872 -- Report of Contributions and Expenditures**

Tax-exempt political organizations, other than QSLPOs, that file Form 8871 must file Form 8872, *Political Organization Report of Contributions and Expenditures*, to disclose information concerning:

- expenditures that aggregate \$500 or more per person, per calendar year; and
- contributions that aggregate \$200 or more per person, per calendar year.

A tax-exempt political organization that does not disclose this information must pay an amount equal to the highest corporate tax rate (35 percent) multiplied by the amount of contributions and expenditures not disclosed.

The filing due dates are available on the IRS web site at [www.irs.gov/polorgs](http://www.irs.gov/polorgs).

A political organization is not required to file Form 8872 for any period of time that it is subject to tax on its income because it did not file or amend a Form 8871.

### **3. Form 1120-POL – U.S. Income Tax Return for Certain Political Organizations**

Political organizations, whether or not tax-exempt, that have taxable income in excess of the \$100 specific deduction in a taxable year must file Form 1120-POL, *U.S. Income Tax Return for Certain Political Organizations*.

Form 1120-POL is due by the 15th day of the 3rd month after the end of the organization's taxable year. Political organizations may request a six-month extension of the filing deadline by filing Form 7004, *Application for Automatic Extension of Time to File Corporate Income Tax Return*. This extension must be filed by the due date of Form 1120-POL. There is a penalty for failure to file Form 1120-POL.

### **4. Form 990 or 990-EZ – Return of Organization Exempt from Income Tax**

Unless excepted (see chart below), a tax-exempt political organization must file an exempt organization annual information return if it has gross receipts of \$25,000 or more for the taxable year (\$100,000 for QSLPOs). A tax-exempt political organization with gross receipts of less than \$100,000 and assets of less than \$250,000 at the end of the year may file a Form 990-EZ, *Short Form Return of Organization Exempt from Income Tax*. Otherwise, it files a Form 990, *Return of Organization Exempt from Income Tax*.

Form 990 or Form 990-EZ is due on the 15th day of the 5th month after the end of the organization's taxable year. There is a penalty for failure to file this return. Organizations may request a three-month extension, without showing cause, by filing Form 8868, *Application for Extension of Time to File an Exempt Organization Return*, by the due date. A second three-month extension, with cause, may also be requested through Form 8868.

Form	When filed	Exceptions to filing requirement
<u>8871</u> (instr.)	Within 24 hours of establishment or within 30 days of any material change, including termination	<ul style="list-style-type: none"> <li>• Organization that does not seek tax-exempt status;</li> <li>• Political committee required to report to the FEC</li> <li>• Campaign committee of state</li> </ul>

		<ul style="list-style-type: none"> <li>and local candidates;</li> <li>• State or local committee of political parties; and</li> <li>• Organization that reasonably expects annual gross receipts to always be less than \$25,000.</li> </ul>
<u>8872</u>	At organization's option, quarterly/semiannually or monthly, on same basis for entire calendar year (see form instructions for detailed information)	<ul style="list-style-type: none"> <li>• Any organization excepted from Form 8871 filing requirement (see above); and</li> <li>• Qualified state or local political organization (QSLPO).</li> </ul>
1120-POL	Due the 15th day of the 3rd month after the close of the taxable year	<ul style="list-style-type: none"> <li>• Political organization with no taxable income after taking the \$100 specific deduction</li> </ul>
990 or 990-EZ	Due the 15th day of the 5th month after the close of the taxable year	<ul style="list-style-type: none"> <li>• Any organization excepted from Form 8871 filing requirement (see above); and</li> <li>• Caucus or association of state or local officials</li> </ul>

#### **Disclosure Requirements**

Tax-exempt section 527 organizations must make their forms (other than Form 1120-POL) publicly available for inspection and copying at their principal place of business.

#### **For More Information**

Questions about the filing requirements may be directed to the Tax Exempt and Government Entities Customer Account Services toll free number 1-877-829-5500. Assistance is available 8 a.m. to 6:30 p.m. ET, Monday through Friday.

## Definition of a Qualified State or Local Political Organization

A qualified state or local political organization is a political organization that meets the following requirements:

- The organization limits its exempt function to the *selection process* relating solely to any state or local public office or office in a state or local political organization;
- The organization is required under a state law to report to a state agency (and the organization does so) the information that otherwise would be required to be reported on Form 8872. The organization will meet this requirement even if the state law does not require reporting of the identical information required on Form 8872, so long as at least the following information is required to be reported under the state law and is reported by the organization:
  - The name and address of every person who contributes \$500 or more in the aggregate to the organization during the calendar year and the amount of each contribution, and
  - The name and address of every person to whom the organization makes expenditures aggregating \$800 or more during the calendar year, and the amount of each expenditure.

However, if the state law requires the reporting of any additional information specified in Internal Revenue Code section 527(j)(3), the organization will meet this requirement only if it reports that additional information to the state agency;

- The state agency makes the reports filed by the organization publicly available;
- The organization makes the reports filed with the state agency publicly available in the manner described in Code section 6104(d); and
  - No federal candidate or office holder controls or materially participates in the direction of the organization, solicits contributions to the organization, or directs any of the organization's disbursements.



## **Annual Information Returns - Section 527 Political Organizations**

Tax-exempt political organizations with gross receipts of \$25,000 or more for taxable years beginning after June 30, 2000, are required to file [Form 990](#). Certain small political organizations may file [Form 990-EZ](#) instead. See the [Form 990 Instructions](#) for more information. Political organizations that receive contributions of \$5,000 or more from any one contributor will be required to include [Form 990 Schedule B](#) with their return. For information about electronically filing Form 990, see [e-file](#).

Qualified state and local political organizations are only required to file Form 990 if they have gross receipts of \$100,000 or more for taxable years beginning after June 30, 2000.

A tax-exempt political organization is not required to file Form 990 if it is (1) not required to file Form 8871 (including an organization required to file as a political committee with the FEC) or (2) a caucus or association of state or local officials. [FAQs regarding the Annual Form Filing Requirements](#) are available.

*Page Last Reviewed or Updated: January 21, 2010*

## Filing Requirements

Political parties; campaign committees for candidates for federal, state or local office; and political action committees are all political organizations subject to tax under IRC section 527.

Section 527 organizations are generally required to file one or more of the following:

1. An initial notice
2. Periodic reports on contributions and expenditures
3. Annual income tax returns and
4. Annual information returns

A political organization must have its own employer identification number (EIN), even if it does not have any employees. To get an EIN, an organization must file Form SS-4, Application for Employer Identification Number. For more information about obtaining an EIN (including how to apply online), see Employer ID Numbers (EIN).

Additionally, many political organizations must electronically file their periodic reports. In order to electronically file these reports, an organization needs the username and password issued to it after filing its initial notice. If you have forgotten or misplaced this username and password, please contact TE/GE Customer Account Services to request a replacement.

### Additional information

- News Release 2002-123
- Fact Sheet 2002-13
- Revenue Ruling 2003-49.
- Revenue Procedure 2007-27 (safe harbor allowing certain tax-exempt political organizations to establish that failure to file Form 8872 was due to reasonable cause and not willful neglect and, therefore, eligible for relief from penalties)
  - State Filing Requirements

*Page Last Reviewed or Updated: December 02, 2009*

## Exemption Requirements - Political Organizations

A political organization subject to section 527 is a party, committee, association, fund, or other organization (whether or not incorporated) organized and operated primarily for the purpose of directly or indirectly accepting contributions or making expenditures, or both, for an exempt function.

A political organization must be organized for the primary purpose of carrying on exempt function activities. A political organization's primary activities must be exempt function activities. A political organization may engage in activities that are not exempt function activities, but these may not be its primary activities.

To be exempt, a political organization must file a timely notice with the IRS that it is to be treated as a tax-exempt organization.

*Page Last Reviewed or Updated: March 15, 2010*

## **TEXAS ETHICS COMMISSION**

### **GENERAL-PURPOSE POLITICAL COMMITTEE FORMS AND INSTRUCTIONS (Last revised: 3/16/10)**

- 1. Appointment of a Campaign Treasurer by a General-Purpose Committee (Form GTA)**
- 2. Form GTA – Instruction Guide**
- 3. Amended Appointment of a Campaign Treasurer by a General-Purpose Committee (Form AGTA)**
- 4. Form AGTA – Instruction Guide**
- 5. Code of Fair Campaign Practices (Form CFCP)**
- 6. General-Purpose Committee Campaign Finance Report (Form GPAC)**
- 7. In-Kind Contribution of Political Expenditure for Travel Outside of Texas (Schedule T)**
- 8. Form GPAC – Instruction Guide**
- 9. Monthly Filing General-Purpose Committee Campaign Finance Report (Form MPAC)**
- 10. Form MPAC – Instruction Guide**
- 11. Correction Affidavit for Political Committee (Form COR-PAC)**
- 12. Request for Electronic Filing Password (Form PASS)**
- 13. Statement of Electronic Transfer Method (Form TRAN)**
- 14. Affidavit for Committee: Electronic Filing Exemption**
- 15. Special Pre-Election Report of Contributions (Form PAC-C)**
- 16. Special Pre-Election Report of Direct Expenditures (Form PAC-E)**
- 17. Correction Affidavit for Special Pre-Election Report of Contributions (Form COR-PAC-C)**
- 18. Correction Affidavit for Special Pre-Election Report of Direct Expenditures (Form COR-PAC-E)**

## **PAC Reporting Requirements**

- 1. Remember to report any in-kind donations. This will mean that you will report not only the in-kind donation itself but also the receipt of any funds paid for the item (for example, a silent auction item for which an in-kind donation of the item was made). The fair market value of the in-kind donation is the amount that should be reported, and remember that sales taxes must be remitted to the state for any sales your club has.**
- 2. The ultimate payee requirement means that if a member of your club requests reimbursement for items, it is NOT the member that you report as the payee – it is the person or entity that the member paid. For example, if the member purchased stamps for the club, the post office would be the ultimate payee and the entity reported as being paid. Don't forget – sometimes on one reimbursement to a club member there may be multiple ultimate payees!**
- 3. NO CORPORATE cash, checks, or in-kind donations may be accepted! This is still true in Texas despite the recent Supreme Court case that characterized a corporation as a “person.” The law in Texas may change, but for the current time follow the rules and laws still on the books here in Texas.**
- 4. Don't forget to obtain the addresses and occupations of any individuals that make a contribution to or receive a payment from your club. You can take care of this easily by having these blanks on forms that the individuals must fill out when giving your club a check or requesting reimbursement. Again, do NOT accept ANY corporate checks, cash, or in-kind donations for contributions!**
- 5. Remember the “purpose of expenditure” requirement. Two items must be reported for each expenditure – the category (for example: food/beverage expense) and a detailed “description” – such as a brief statement or description of the PAC activity that is conducted by making the expenditure.**
- 6. TEC allows PAC's to hire a PAC treasurer. However, caution should be taken in doing so. Many club bylaws only allow a full member to serve as the PAC treasurer. Also, hiring someone to perform the PAC functions MAY subject the club to various employment issues (such as filing a Form 1099 with the IRS, etc.). Please research this thoroughly in advance of taking any action!**
- 7. On the TEC website listed below, there is information regarding political advertising (with suggested wording of information for clubs' newsletters, emails, etc.) as well as the schedule for PAC reports due. Please visit this website for further information on these topics and more. Please call or email me as well.**

**TEC website: [www.ethics.state.tx.us](http://www.ethics.state.tx.us)**

**TEC telephone (Austin): 512-463-5800 (Mon.-Fri., 8 AM to 5 PM)**

**Julia Morton, TFRW PAC Treasurer: 281-367-2495([mortonags@yahoo.com](mailto:mortonags@yahoo.com))**

## **Rules Regarding TFRW Clubs and Federal Candidates**

**With the anticipation of the 2012 elections many candidates have announced their candidacies and begun campaigning this year. Many of these races are federal.**

**TFRW and all of its clubs are Texas *state* political action committees (PAC's), but they are NOT *federal* PAC's. To contribute to federal candidates a PAC (club) must be registered as a federal PAC, follow federal PAC rules, and file federal PAC reports. This is in addition to following Texas state PAC rules and filing state PAC reports. Since TFRW is only a state PAC, the TFRW PAC treasurer is unable to assist your club with federal PAC rules should it choose to become a federal PAC as well as a state PAC. Individual club members may, however, make *personal* donations to federal candidates.**

**Of course, federal candidates may speak to your club. However, your club should NOT make ANY donations to federal candidates UNLESS your club wishes to also become a federal PAC. This prohibition extends to paying for federal candidates' meals, parking, etc.**

**In addition, at each club function where a federal candidate appears, the club MUST have a federal disclaimer posted. Since many federal candidates will be attending club meetings in 2011 and 2012, a good idea would be for your club to have this disclaimer posted. The wording of the disclaimer is as follows:**

**Solicitations made by Federal candidates and officeholders at this event are limited by Federal law. The Federal candidates and officeholders speaking tonight are soliciting only donations of up to \$2500 from individuals and up to \$5000 from multi-candidate political committees. They are not soliciting donations in any amount from corporations, labor organizations, national banks, Federal contractors, or foreign nationals.**

**Also remember that if your club invites one candidate in ANY race, it MUST also invite ALL other candidates in that race as well. This is TFRW policy.**

**Just remember:**

- 1. Do NOT contribute *anything* to federal candidates (unless your club wants to become a federal PAC as well as a Texas state PAC);**
- 2. Post the federal disclaimer at any meetings or functions at which federal candidates or officeholders appear (this means all of your meetings or functions in 2011 and 2012 to be on the safe side); and,**

**3. Invite ALL candidates in ANY race to speak at your meetings or functions.**

**Please do not hesitate to contact me with any questions.**

**Julia Morton, TFRW PAC Treasurer  
281-367-2495**

## **PAC Report Deadline Reminders**

**This being a very busy election year, our clubs must file PAC returns with the Texas Ethics Commission (TEC) much more frequently. There are several additional pre-election day reports due before the primary election, the unified election, and the primary runoff election. If your club has ANY political activity during any of these reporting periods, the report MUST be filed. In my opinion, file ALL of these reports to be on the safe side! (This 2012 filing schedule is available on the TEC website, which will be listed at the end of this article.)**

**The following are the filing deadlines and corresponding reporting periods for 2012:**

**Monday, March 5 – 30th day before the April 3rd primary election  
(January 1-February 23)**

**Monday, March 26 – 8th day before the April 3rd primary election  
(February 24-March 24)**

**Thursday, April 12 – 30th day before the May 12th uniform election  
(March 25-April 2)**

**Friday, May 4 – 8th day before the May 12th uniform election  
(April 3-May 2)**

**Tuesday, May 29 – 8th day before the June 5th primary runoff election  
(May 3-May 26)**

**Monday, July 16 – July semiannual  
(May 27-June 30)**

**Tuesday, October 9 – 30th day before the November 6th general election  
(July 1-September 27)**

**Monday, October 29 – 8th day before the November 6th general election  
(September 28-October 27)**

**Tuesday, January 15, 2013 – January semiannual  
(October 28-December 31, 2012)**

**The bad news is...LOTS of reports to file! The good news...not so many days of activity to report in any one of these reports!**

**Remember, the reports are due online by midnight of the due date.**



**Please don't hesitate to call or email me, or call the TEC at the contact information listed below.**

**The reports are not difficult to file – just remember to file everything, including in-kind donations, do not accept ANY corporate monies, and use the ultimate payee rule. In addition, do not make any donations to federal candidates from your club – this will make your club a FEDERAL PAC as well as a Texas PAC, and your PAC treasurer will have to file another set of reports with the Federal Elections Commission (FEC), whose rules I am not familiar with and cannot assist your club PAC treasurer with – you're on your own with the FEC! Also, remember that our clubs are NOT charitable organizations and cannot hold raffles. Silent auctions, however, are permissible.**

**Julia Morton, TFRW PAC Treasurer**  
**281-367-2495**  
**[mortonags@yahoo.com](mailto:mortonags@yahoo.com)**

**Texas Ethics Commission (TEC)**  
**Monday-Friday, 8 AM-5 PM**  
**512-463-5800**  
**[www.ethics.state.tx.us](http://www.ethics.state.tx.us)**

## **Fundraising Do's and Don'ts**

Many clubs ask questions regarding what things they should or should not do in relation to their fundraising efforts. Unfortunately, some questions are asked **AFTER** certain actions have been taken, and it is too late to make the necessary changes to ensure proper reporting, etc. for these decisions. It is my hope that this article will help clubs have the information to make correct decisions **BEFORE** any problems might arise.

Not every aspect of fundraising can be addressed in this article. I've only tried to shine the spotlight on some fundamental issues that seem to often arise for our clubs.

It is with thanks to Cynthia England, TFRW Treasurer and Tomi Porterfield, past TFRW Treasurer that I have borrowed some of their ideas and incorporated them with my own for this article.

1. **BEFORE** deciding what your club wants to do with the funds raised, make sure your club members understand any limitations, reporting requirements, and restrictions that may exist and apply to your club and to these fundraising efforts.
2. **BEFORE** your club embarks on any fundraising endeavor, ensure that whoever is making decisions as to venues, deposits, and any other monies expended has the express permission of the club first!
3. Include the PAC treasurer on your fundraising committee. She can help guide the club as to proper reporting requirements and necessary information that must be obtained from any person or entity donating money or in-kind items for your fundraiser.
4. Create good forms on which you can report the required information for PAC reporting, such as names, addresses, amounts, occupations, etc. This goes for incoming money and in-kind donations, as well as money spent for the fundraiser.
5. Remember, you cannot accept cash **UNLESS** you obtain and report all required information to report to the Texas Ethics Commission (TEC). Otherwise, the cash **MUST** be donated to a 501(c) (3) charitable organization.
6. Federal rules apply to donations to Congressional candidates. Your club would have to follow Federal Ethics Commission (FEC) rules and regulations, in addition to TEC rules and regulations.
7. Keep accurate, detailed records of each item purchased and each payment and donation made. You must report the purpose of the expenditure according to

**TEC rules. Refer to the TEC website (the address will be given at the end of this article).**

**8. Remember, in-kind donations are treated just like other donations. Use the fair market value on the date the in-kind donation is made for the amount of the donation.**

**9. If you purchase an item for re-sale (or receive an in-kind donation for re-sale), you will have two transactions to report to the TEC. First, the purchase or receipt of an in-kind item, and second, the sale to the purchaser.**

**10. Sales taxes MUST be collected and remitted to the state comptroller for any items sold and for any money collected from silent auctions, etc.**

**11. Raffles are NOT permitted. Only charitable organizations may hold raffles, and our clubs do NOT fall under this category. Calling a raffle an “opportunity ticket” does NOT get around the fact that the undertaking is a raffle. Just do NOT hold them.**

**12. Your club may NOT accept ANY donations, whether cash, checks, or in-kind, from corporations.**

**13. Meals ARE also subject to sales taxes.**

**14. Advertisements in your club newsletters (as long as the advertiser is NOT a corporation) are NOT subject to sales taxes.**

**15. Be sure to include a disclaimer in any of your fundraising solicitations and other publications. The disclaimer should say something like, “Political advertising paid by Suzy Q. Republican Women PAC.” The disclaimer should also include something such as, “Contributions are not deductible for federal income tax purposes.” Also, post a federal disclaimer at your registration table for federal candidates attending your fundraiser. This disclaimer is listed on another page of this handout.**

**I know that the above items seem to make fundraising a difficult chore. However, if your club follows these basic rules, you won’t have too many problems with recordkeeping and reporting. Have fun with your fundraising!**

**Please do not hesitate to contact me AND/OR the TEC if you have any questions. The website for TEC is: [www.ethics.state.tx.us](http://www.ethics.state.tx.us). Their phone number is: 512-463-5800 (Monday-Friday, 8 AM-5 PM). They are generally very helpful.**

**Julia Morton, TFRW PAC Treasurer  
281-367-2495  
[mortonags@yahoo.com](mailto:mortonags@yahoo.com)**