



Volume I – How to Start A Group

How to Tea Party Encyclopedia *Master Document*

A Compilation of How to Tea Party Documents

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Volume I: Start a Group



Starting a Group

Building a Coalition (Revision date 1-12-2013)

My husband and I had a cattle ranch. Occasionally, we would need to gather them all for shots or other kinds of treatment. In order to treat them we needed to gather them into the barn, then into stalls and eventually into the chute so that we could give them their medicine.

Needless to say, they didn't like it, even though we were only trying to help them and our motives were in their best interest. They didn't know our motives and they didn't trust us.

Together, we would saddle up our horses and go out to the herd and try to move them towards the barn. We'd start off slowly and try to move them along the fence so that we only had three open ends to close off. Then, as more and more joined the herd, we found that some were able to "escape". They would dodge us and race off in the opposite direction. One of us would go after the wayward cow and try to herd them back to the group while the other would try to keep the rest from running off.

You'd think they'd be appreciative that we were trying to help them. Nope! Not an ounce of gratitude. Even after they got their eyes soothed, or got treated for ringworm or got shots of antibiotics to help with an infection, they just wanted to get back to eating grass and being left alone.

Sometimes, trying to build a coalition can be as frustrating as herding cattle who don't want to be herded. Group leaders don't know what the motive is and don't trust "outsiders", so they resist any attempt to work together.

What brought the necessity of creating a coalition? Our group, over a period of three years, launched 31 groups and some of those groups have followed suit and helped to launch other groups as well. With the launching of all these groups came hundreds of e-mails for help.

New group leaders needed help and they came to us. We wanted to provide assistance for them but needed others to help as well. We thought that creating a network would provide a sort of "resource center" where we all would contribute to helping these struggling groups.

While we now have a great regional network with over 30 groups, it took three attempts to get here.

Some of the things that happened when we tried to get us all together:

- Some leaders thought that our group was trying to take them over.
- Others had no clue who we were so why would they want to get involved with another group. After all, they had enough trouble of their own, they didn't need someone else's problems too.
- A handful of leaders were threatened by a seemingly stronger group and were intimidated.
 - They also became very negative and toxic to some of the other groups.
- We chose to work with only the "friendlies". They don't want us and we certainly don't need them.
- A lot of work needs to be done. When you have to deal with negativity, it saps the energy you need to accomplish the goal and mission of your group.
- There actually were some leaders who became very territorial and felt that there was too much of a difference from area to area.
 - In reality it boiled down to the prior reason, they were threatened.



Why did we want to build a coalition? For a number of reasons. Not the least was to help struggling groups. We had been fortunate to be blessed with great leaders in one area and we wanted to help others that weren't as fortunate.

We also knew that all of us as leaders have different personalities and leadership style. This is a good thing because each group will move to where it is the most effective and prosper there while others will move to a different path and prosper where their talent lies.

Allowing everyone to come together and share what they are doing in their communities has been a gift for us all. At each of our regional meetings, each group leader (or someone they select) has the opportunity to share something that they are doing that is successful. The number of amazing ideas that we all get from these sessions is priceless.

We learn, grow, understand and are challenged when we network with other conservative groups and organizations. Not all groups are "Tea Party" groups. There are conservative groups that hold to our core values and we enjoy working with them, learning from them and growing with them.

Having these regional meeting has also allowed us to gather leaders from a wide area to help with Get Out The Vote efforts, understanding issues and candidates so that we can be influential in our own districts without violating our tax exempt status.

When there is a statewide rally (such as our Tax Day Rally), we have 30 groups helping instead of just one. We share the load and share in the rewards as well.

Instead of taking the time to go into the first two attempts I will give you what we did after each effort. We asked these questions:

- What did we set out to do?
- What actually happened?
- Why did this happen?
- What will we do next time?
- What should we continue to do?
- What should we do differently?

Some of what it took to break down the barriers was just time. Time is the best truth teller and it always rises to the top. Time revealed that we know that this isn't at about US; it's about our state and our country. There is no room for ego or power struggles. Time is short and we need to learn to "hang together or we will surely hang alone".

The advantages of working with other groups are :

- Creativity for success. Sharing ideas, concerns and successes.
- A feeling of being part of something bigger than ourselves.
- A team is something that you play on once in a while. A network is a place where you belong.
- It shows greater force when you need it for a large event or an election.
- You remain independent yet it raises your level of accountability when you know others are counting on you.



- It helps to keep us focused and encouraged.

In the book by Jim Ballard, *"Whale Done! The Power of Positive Relationships"*, he tells about two men who have been training killer whales at SeaWorld in San Diego, California. They wanted to tell their story of an amazing example to illustrate the power of building positive relationships.

It doesn't take much to convince people that it probably wouldn't be a good idea to punish a killer whale and then tell the trainers to get in the water with it. They don't call them killer whales for no reason. When the trainers work with the whales, there is no negative interaction between the trainers and the whales. When a new whale – whether from another facility or a newborn - they don't do any training with that whale for weeks. All they do is feed and play with it.

When asked why SeaWorld had this extended no-training period they said, "We want to convince the whale that we mean it no harm." What a wonderful concept!

The problem with most group leaders is that there is little trust between them and other leaders in their area. It is important to build trust with each other by reaching out for no reason than to better the person you reach out to.

Without trust, it is difficult if not impossible to inspire involvement and interaction from other leaders. Proving yourself to be a person who is trustworthy, honest, real and with integrity of character will take time and a sacrificial willingness to help others.

If you have to tell others how good you are, then there may be a problem. Those who I know to be true, honorable, trustworthy, faithful, patient and just good people don't need to tell others. They just are.

Build your coalition with those who are of true character. Those who are dependable and faithful to the mission. Without ego. Those who have a strong enough self-image that their only concern is that the job gets done, not that it is them that does the job. If it matters that they be the one to do a job or get the credit then they are there for the wrong reason. It should only matter that the job gets done.

In building a Coalition, you are going beyond building a team. You are building a Network. You will have a network of individuals who have something to contribute; people who love their country and want to make a difference. They are your gift. Work with them.



Starting a Group

Developing a Mission Statement (Revision date 1-12-2013)

Mission Statements are the inspiring words chosen by successful leaders to clearly and concisely convey the direction of the group or organization. By crafting a clear mission statement, you can powerfully communicate your intentions and motivate your team, group or organization to realize an attractive and inspiring common vision of the future.

A Mission Statement defines the organization's or group's purpose and primary objectives. Its prime function is internal – to define the key measure or measures of the group's success – and its prime audience is the leadership team and interested members.

Mission Statement Creation

- To create your mission statement, first identify your organization's or group's "winning idea". For instance, you may want your group to "put vetted conservatives in all open seats in your community and beyond".
- This is the idea or approach that will make your organization or group stand out from others and is the reason that you will draw interest from your community.
- Next identify the key measures of your success. Make sure you choose the most important measures (and not too many of them!) An example, "You will provide the necessary funding, candidates and education of those candidates".
- Combine your winning idea and success measures into a tangible and measurable goal. "We will nurture these local office holders to grow into more influential positions within the state government".
- Refine the words until you have a concise and precise statement of your mission, which expresses your ideas, measures and desired result.

Example:

I would prefer that you be working from your own creative juices so I will provide an example for something unrelated to the Tea Party movement.

Take the example of a produce store whose winning idea is "farm freshness". The owner identifies two keys measures of her success: freshness and customer satisfaction. She creates her mission statement – which is the action goal that combines the winning idea and measures of success.

The mission statement of Farm Fresh Produce is:

"To become the number one produce store in Main Street by selling the highest quality, freshest farm produce, from farm to customer in less than 24 hours on 75% of our range and with 98% customer satisfaction."

It is said that without a plan, plan to fail. A Mission Statement is the first step of your plan for your group or organization. It is what will keep you on track and help you to remain focused.



Steven Covey has many helpful hints for creating a mission statement on his website.

You may want to check it out:

<https://www.stephencovey.com/7habits/7habits.php>



Starting a Group

Establishing Your “Business” Status (Revision date 1-12-2013)

Many Tea Party groups wrestle with how they want to set. Some choose to keep it like a personal club and run all their financial transactions through their own personal checking account.

Others set up like a Sole Proprietorship or a small business. They get their Resale License, Business License and set up a separate checking account.

Still others go for getting their non-profit status to feel more protected. A few others take it the rest of the way to get their 501(c)3 or 4.

As I go into each of these options, I will also give you the plusses and minuses of each one.

Setting up like a “club”:

First, the most dangerous thing you can do is to co-mingle any Tea Party group income or expenses with your personal account. The IRS is watching all in the Tea Party movement like hawks. There needs to be a clear separation from your personal finances and any finances connected to your Tea Party activity.

It is also very difficult to maintain transparency with your other core leaders when everything is co-mingled with your own personal funds. You'll never truly know where you stand with group expenses verses your personal ones. Even if you can keep track, it will create a tax nightmare for you.

Setting up like a small business:

The first thing you need to do is get a Business License from your City Hall. You will need to name your group and pay a small fee for your license.

Next, you need to get a re-sale number from the Franchise Tax Board and a Federal Tax ID number from the IRS (you can do that on line). This will facilitate your ability to have merchandise that will allow you to sell for income. You can get that by going on line to www.irs.gov. There is no charge and you can do it on line.

The plus to this option is that it can be done quickly and doesn't cost much. The downside is that for any merchandise you sell, the profit is taxable. You are also required to charge sales tax. This means that you are liable to pay the sales tax that you have withheld to the Franchise Tax Board at the end of each quarter.

Cash donations are considered income and taxable. You will also be subject to Mill Taxes from your city, in addition to the state, federal and sales taxes.

Going for your Non-Profit status:

The first step to take is to apply for your Articles of Incorporation. You can begin that on line by going to www.ss.ca.gov. There will be a template under “non-profit” that you can download, print, fill out and send in. There is a \$20 charge for this.

You will need to go on line and get a Federal Tax ID number.



It will take from 30 – 60 days to hear back from them with approval and your Articles of Incorporation. At that time, you will need to pay the state \$850. That is your yearly fee for having a corporation. If you intend to remain a non-profit, you must take the next step or you will wind up in serious tax mess.

Filing for your 501(c)3 or 4

Before I go any further, there is a difference to 501(c)3 and 501(c)4. A (c)3 allows you to give a donation receipt, but you have to reveal who gives those donations. Also, a three is considered a charity.

A (c)4 is considered educational and does not have the same requirements with donors as the (c)3 does. However, donations are not tax deductible. Also, a (c)4 limits endorsement of political candidates. This is a plus if you are a group that wants to stay away from that sort of thing as most Tea Party groups prefer.

When you get your Articles of Incorporation, you can go to www.irs.gov and find the form you want. Download the form, follow the instructions and send it to the IRS. There is a \$20 fee when you submit your application.

This process can take 9 – 12 months to finalize (or as in our case, it took three years). It is not uncommon for them to send you a package asking for further or more information months after you submitted your forms. Go over their requests thoroughly and provide what they ask for – and wait.

The final step is to now file with the state. This is a rubber stamp once the IRS has approved you but you still have to do it. Go to www.ftb.ca.gov and download the proper form and send it in. Yes, there is a fee for this too, \$20.

The downside of doing this is all the paperwork and the \$850. You will also need to establish By-Laws and have a Board of Directors. However, most groups have a core leadership group that is really their “board” – they just don’t know it.

To get some ideas on establishing these, I recommend “Roberts Rules Of Order” – boring reading but very informative. You can also go on-line at www.lawmart.com/forms/fnp-b109.htm. You can view those and just re-type them.

The upside is that once you have your Articles of Incorporation and filed for a 501(c)3 or 4 you can function like a 501(c)3 or 4, no matter how long they take to give you their approval. Our group was one of the targeted Tea Party groups and it took almost three years and pressure from our Congressman, but we got it.

When you provide merchandise, you will get a donation for that item and you do not pay income tax or sales tax. When individuals help to sponsor your expenses or an event, it does not count as income. Nor do you have to divulge who the donation came from.

Bookkeeping is made easy with QuickBooks and will also provide you with your monthly reports for your board and end of the year report for the IRS.



Starting a Group

Finances (Revision date 1-12-2013)

Creating a Budget

As we embark in the area of leading a Tea Party group, whether local or with a broader reach, in many ways, it is like running your own business. There are expenses that you will incur and you need to know how you're going to pay for them.

The smartest will have a plan while others will just wing it without a lot of preparation. Some will make their plan along the way with adjustments as they are needed. Money is always a great consideration.

At the beginning, as with starting up a business, you most likely will be your group's "bank".

- 1) If you have your Tea Party group name, you will need a mailing address. You may not want to give your home address so you will need a P.O. Box that you will get from your local post office.
 - Having your home address will signal to the IRS and your City Government that you are running a business from your home.
 - Having your home address as your group address will expose you to hecklers and unwanted solicitation.
- 2) Do you want people to have your home phone number or are you going to provide a separate phone number for them to call? That takes either an additional cell phone or a phone line brought into your home or office.
 - Other options are available such as "Ring Central" for a nominal fee.
- 3) You will need to purchase some office supplies to conduct your meetings and provide material to you guests.
 - Sign-up sheet to begin gathering information for your database
 - Pens and pencils
 - Note pads
- 4) If you host your meetings, you should make a sign to put out so that people know where you are.
 - You may want to put balloons on your sign
 - More than one sign is always recommended
- 5) No meeting is complete without some beverages and light snacks.



- Water at the least
- Coffee if you have the funds (put a donation can by the coffee pot)
- Of course, cookies will go like lightening (you can begin asking others to be in charge of a certain meeting through a sign-up sheet)

All of this costs money.

Once you have your name, open a checking account to pay for these expenses.

A Word Of Caution: Never mix your group funds into your own personal bank accounts. You will set yourself up for scrutiny from every bureau of, department of or agency of and all of your personal information will be out for all to see. To avoid unnecessary invasion of your privacy, open up a separate checking account.

You will be the one to open it with your funds (in most cases). Decide what you will put in your checking account and mark it as “start-up” costs.

Now, how do you create a budget when there is no income? Good question. The first thing you need to do is decide what you’re willing to “donate” as your start up account. That will be your guide for your first budget.

How much money do I have to start with?

How much do I need for:

- P.O. Box
- Telephone
- Office supplies
- Meeting supplies

Do I have enough?

If the answer is “no”, then you ask yourself, “What do I need to eliminate?” “Who can I get to help?”

How do I get “reimbursed” for these expenses? Another good question. If your output requires a partial reimbursement then you need to ask those at your meeting to help support their group. Remember that if you ask others to donate, you must also be willing to make a financial commitment too. Don’t ever expect for all of your expenses to be taken care of by those in your group. But it is certainly acceptable to ask for help with them.

Other ways to bring in income is to provide Tea Party merchandise that you can purchase and give to people when they make a “donation”. Other sources of income would include Tea Party lapel pins and bumper stickers.



Be sure that you DO NOT SELL any of these items or you will need a California re-sale number, a business license and you will have to charge sales tax. Then you will be responsible to pay those taxes quarterly. These must only be provided with a donation.

Record Keeping

It is imperative that from the moment you launch your group that you keep detailed records. As one of the Tea Party groups that the IRS targeted, it took us three years to get them off our back, dozens of man hours compiling the information that they requested, ink toner and reams of paper beyond expectation and postage to mail all of that to them, not once, not twice, but three times.

When it was all said and done, we won but not without oodles of determination and persistence AND copious record keeping!

Every event had its own file. Every general session meeting had income and expense records. All board meetings had minutes. Every expense was documented and all donations were also documented. Nothing was missing or out of place.

To keep our records, we have chosen Quick Books. If you are a 'non-profit' organization, there is a Quick Books Non-Profit version as well. These programs are user friendly and easier than keeping books by hand.

Create a filing system that works for you. Filing is not for storing information. A file is for the retrieval of information when needed so keep that in mind as you get started.

- Keep all of your receipts.
- Keep copies of all deposits to your bank account.

As your group grows and you get to know individuals, you will find talent you didn't know you had. There will those who can help with your bookkeeping, data entry, organizing the logistics for your meetings and many other tasks you will need to delegate to others.



Starting a Group

Establishing Committees Within Your Group (Revision date 1-12-2013)

Few of us are fond of admitting that we can't do everything – and all at the same time. I know that I tend to think that I have 36 hours in my day and the energy of a 20 year old. It doesn't take me long to realized that my days are no longer than anyone else's and I am a grandmother of seven. I can't do what I could when I was in my 30's, yet the demands are more. So what do I do?

You will be faced with the same realization that I did as you grow your group. It's a wonderful discovery to find that those members in your group need to feel that they are contributing. A very effective way to ensure that those who want to do part of the work get that need met and, at the same time, multiply your groups' efforts, is to form committees.

Before you launch your committees decide what committees you feel will be useful and what their purpose will be. When deciding which committees you will have, keep the number manageable and relevant. Having a committee just to have a committee will be a waste of time and human resources. You want your committees to succeed.

Here are a few suggestions:

- Be sure that they adhere to your core values. Someone in our group wanted to start a “self-preservation – survival” committee. While a noble thought, we would be funneling human resource energy that was directed inward rather than outward. We do provide names of community organizations that already provide that type of information and encourage those who are interested to attend those meetings.
- Who will be your committee leaders? Be sure that they are solid in their understanding of your groups' vision and purpose. Also, he/she must be able to lead.
 - While some may “want” to lead, they may not have the skills.
 - You will need to decide if you can invest some time with them to help them succeed.
 - You could have “team” leadership where one will compliment the other.
 - I tend to be a task oriented leader. That can be good and bad.
 - I have learned that I need a “softer” leader by my side to tone me down a bit.
 - My abilities will help that individual to be a bit stronger and their strengths help me be more sensitive. It's a win-win.
- How many committees will you have?
 - What will they be called?
 - What is their purpose?
 - It's important to pick committees that have meaning and impact.



For instance, we have four:

Legislative Committee:

- Assigns individuals to certain legislators to monitor how they vote.
- Others volunteer to attend the School Board, City Council, County Board of Supervisors and other city or county Meetings.
- A committee like this can provide “report cards” before elections as a voter aid.

Media Watchdog Committee:

- Responsible to not only monitor the media and make them report truth and hold them accountability.
- They also send out press releases when we have an event.
- They build a rapport with our local media as well.

Science and Politics Committee:

- Devotes their time to the study and research CARB issues in California.
- Does research regarding man made Global Warming and false environmental reports that increase regulatory control.

Education Committee:

- Responsible to provide resources for our members and the community at large.
 - Involvement with community events:
 - Parades
 - Fairs
 - Community work days
- They are active with schools and often go to campuses to speak about our Constitution.
- Create a reading list on our web-site.



- When will they meet?
 - Will it be the same night as your general session?
- Where will they meet?
 - Will it be in the same facility where your general sessions are held.

I will reveal some of the frustration we went through while trying to launch committees that were unsuccessful. We tried several things and after visiting another neighboring Tea Party group that had been successful with committees, we finally fell into a zone where we are now effective.

Plan A was beginning with having just three committees. I found three solid leaders and then had a special meeting where we invited those who thought they'd like to serve on a committee. I had nice little notebooks with a description of each committee, its purpose and the "how to's" to get the job done. Hey, I was organized and ready to have a great successful group of committees ready to ride off saying..."High Ho Silver!" Well, what happened next resembled more like a firework that didn't get more than two feet off the ground and fizzling out.

Our problem was that we never anticipated the problem of having a meeting on a separate night from our general sessions. The leader had to have it in their home or the home of one of the members, which did not set well with everyone. Not to mention that we were adding two more nights a month where they would be attending a meeting.

Plan B was to have the leaders meet before our general session at the facility where the meeting was currently held. They'd grab a corner somewhere and try to hold the attention of those who were faithfully attending his/her meeting. Unfortunately, that didn't work either as many of our members like to arrive early for refreshments and chatting with others before we get into the business of our group and our guest speaker.

Plan C was to try to have the committees meet in corners of the large room following the general session. Again, that didn't work because we always have lingerers who enjoy talking to one another and the guest speaker. It was an effort that "futile" is too tame of a word to describe.

Plan D came when we finally changed locations. We now have a facility that has a large meeting room and classrooms for breakouts after the general session. Our new format only increased the time of each meeting by 30 minutes but participation more than doubled.

We open with our pledge and business, bring in our guest speaker and when he/she is done, we go to our break out committees and meet. During that time, all new people stay in the main auditorium for orientation. We explain how Tea Party got started, who we are, what our core values are, our mission and then we open it up for questions and answers.

When a committee has information that they want to present to the entire group, they get the microphone during the general session, prior to the guest speaker. We also will post their findings on our web-site. We often print their research and keep it at the registration desk for members to take and review. Sometimes, we



include their information in our e-mail blasts. No matter how you use the information, it's vital for the health of your committees' success that their research is appreciated and dispersed among your group.

It's also a good idea to combine some of these committees with other Tea Party groups in your area that can help with your research. For instance, if there is more than one group in your county, have each group report back on their local school boards and city councils. They can also share the load of monitoring the legislators. There is power in numbers. Don't be afraid to join forces with other groups. You need each other.