

## Starting Your State Affiliate LGBTQ+ Caucus - 1

The NEA-LGBTQ+ Caucus is here to help! This document outlines the recommended steps to form your State Affiliate LGBTQ+ Caucus. Working together will increase our overall capacity and advocacy in supporting our LGBTQ+ members and students. Our goal is to help support and provide you with the infrastructure to get started.

### 1. Does your State Association Support Caucuses?

It is important that you locate and review your State Association's Constitution and Bylaws. What is the specific language allowing or forbidding caucuses? Similar to a GSA, if your State Association has other caucuses, it should allow a LGBTQ+ Caucus. If your State Association allows caucuses, contact your Governance Staff or Secretary/Treasurer for specific caucus procedures and forms required to be an officially recognized caucus. In most cases, recognized caucuses are provided meeting spaces at your State Council/Representative Assembly, conferences, and other events. In addition, most State Affiliates allow recognized caucuses to "table" and many conferences and prominent events.

If your State Affiliate does not allow or recognize caucuses, don't give up! Generally, caucuses are outside of the governance structure of the State Association. What does this mean? Caucuses are autonomous groups that operate by their own governing documents and are not dependent on the State Affiliate for funding, support, or other assistance. In many respects, caucuses are like school clubs that operate within the school environment however, caucuses exist to monitor, support, or create policies that benefit your special interest group (i.e., policies that benefit your LGBTQ+ members and students, etc).

### 2. How Do We Get Started?

You need to find others to be members of your caucus. There really isn't a magic number that you need to wait for – just start talking to other educators to find support for your issues. Most recognized caucuses hold their official business meetings at their State Council/Representative Assembly. Why, because this where the caucus can influence your State Association's policies. Many of the initial caucus members will come from the elected State Council/Representative Assembly delegates. These are the official delegates who are allowed to speak on the Council/Assembly floor, submit New Business Items, and serve on Association committees. Caucuses should also recruit members from all over your state – at conferences, buildings, etc. Your caucus's influence will grow as you increase your membership ranks.



nea-lesbian, gay, bisexual, transgender, queer+ caucus

NEA-LESBIAN, GAY, BISEXUAL, TRANSGENDER, QUEER+ CAUCUS  
2321 E. 4<sup>th</sup> Street, #C438, Santa Ana, CA 92705  
[www.nea-lgbtqc.org](http://www.nea-lgbtqc.org)

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If your State Affiliate does not recognize caucuses, that doesn't mean you cannot create a caucus. It just means that the State Association will not provide you with meeting space at their official Council/Assembly. You will still need to recruit members. Talk to other delegates and ask them to join your Caucus. Hold your meetings online prior to your Council/Assembly, meet at a restaurant/bar, your hotel room, or just about anywhere you want. Remember, your caucus is outside of the State Association's governance structure.

### 3. We Have Recruited People, Now What?

Congratulations! Now you are on your way to advocating for your LGBTQ+ members and students! You will need to develop and design your caucus's governing documents – "Constitution & Bylaws", "Standing Rules", membership form, and dues structure, etc. The first item of business is what are you going to name the caucus? Most State Affiliate Caucuses are following the **NEA-LGBTQ+ Caucus** structure but your name should reflect the needs of your group.

The NEA-LGBTQ+ Caucus can provide you with templates for the following documents: "Constitution & Bylaws", "Standing Rules", membership form, etc. These forms can be customized to your specific needs.

### 4. Communication

You should create a caucus email account, for example, **nea-lgbtqc@gmail.com**. In addition, you may want to use this account to collaborate on your governing documents, create a virtual phone number, etc. Be sure to write down the account name and password.

### 5. Caucus Governance

Once the governing documents are established, there should be general consensus on the written policies & procedures and a vote taken to follow the new Constitution & Bylaws. Designate a person to take minutes of this first official Caucus meeting. Motions to create the Caucus and subsequent actions should be recorded. The minutes should list who was present at this meeting and signed by the recorder following the meeting.

Once the documents are established, the initial caucus members should pay their dues and an election of officers should take place. Once the officers are established, all dues



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money should be given to the Caucus Treasurer. Your Caucus Treasurer may contact the NEA-LGBTQ+ Caucus Treasurer to deposit your initial funds with the NEA-LGBTQ+ Caucus. Once your Caucus has its bank account, the NEA-LGBTQ+ Caucus will return a check in the amount of the initial deposit, made out to your Caucus.

### 6. Setting Up Caucus Financial Accounts

The first thing that you will need to do contact the IRS and apply for your Caucus's Employee Identification Number (EIN). This number is specific to your Caucus and is similar to a Social Security Number. The EIN will allow your Caucus to open a bank account and apply for official non-profit 501(c)(3) status if desired. Do not use any member's Social Security Number to do any official business such as opening a bank account, PayPal, or other financial transaction. Using a Social Security Number ultimately gives ownership of your Caucus's funds to the individual. Furthermore, the individual would be personally responsible for all taxes, fines, etc. Go to (irs.gov), type EIN in the search window and apply online. You should receive the EIN in two weeks or less. Once you have this number, you can then complete the following steps:

- A. Select a large national bank or financial institution to open a Caucus checking and/or savings account. The bank should have multiple branches so that future officers have access to the accounts. The financial institution may ask for the initial minutes, bylaws, etc. that show that the Caucus was formed and authorized to open an account. The Treasurer should be the primary contact and the other officers should be added to the bank account. You should shop around for the bank that has no fees to maintain the accounts. The Caucus account should not be attached to any personal accounts. The mailing address for the bank account can be a personal address.
- B. Once you have the checking/savings account you should open a PayPal and Square account. You will need your EIN, banking information (routing/account numbers), caucus email address, etc. Be sure to select the free or reduced account. Write down the log-in email and password and keep in a safe place.
- C. You will need to create an EXCEL or similar spreadsheet to record Caucus spending. The NEA-LGBTQ+ Caucus will provide you with a template to get started. If you would like a more advanced program such as Quicken or QuickBooks, you will need to purchase this product.



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### 7. Collecting Dues

Refer back to your Constitution & Bylaws for your dues structure. If your Caucus decides to remain independent of the NEA-LGBTQ+ Caucus, you can create your membership form, data collection, and website.

If your Caucus decides to partner with the NEA-LGBTQ+ Caucus and offer JOINT DUES, your Caucus will receive the following benefits:

- A. TWO online membership links – One- that collects information and payment for your members who only want to join your Caucus, and TWO- a JOINT membership link that will collect membership information and payment for both caucuses. The NEA-LGBTQ+ Caucus will then send you a dues check. Your Caucus Treasurer will have access to the collected information.
- B. The NEA-LGBTQ+ Caucus will create your annual blackline-master membership form.
- C. The NEA-LGBTQ+ Caucus will prepare your Pre-Paid memberships prior to the NEA Representative Assembly. We will also include your supplied materials (ribbons, invitations, etc.) in your specific members' envelopes. We will drop any uncollected Pre-Paid envelopes in the US mail so that your members receive their materials even if they do not attend the NEA-RA.
- D. The NEA-LGBTQ+ Caucus will purchase your website name, host, and create a one-page/SPLASH page for your Caucus. General information and membership links will be placed on this website.
- E. Send two "Renewal Reminder" emails to your Joint Members prior to the NEA Representative Assembly.
- F. Provide virtual JOINT Officers meetings during the year.
- G. Link your Caucus's website to the NEA-LGBTQ+ Caucus's site.



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