



END CORPORATE RULE. LEGALIZE DEMOCRACY.

MOVE TO AMEND



Welcome!

Take Action Webinar

September 13, 2011

The webinar will begin in a few moments.

Please call **(218) 339-2409** and
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We the People of the United States
in order to form a more perfect Union, establish Justice, insure domestic Tranquillity, provide for the common defence, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do hereby constitute and establish this Constitution for the United States.

Webinar Orientation & Participation Tips

- **Participant list:** on the left – see who else is here.
- **Feedback to presenter:** on the bottom left – too fast? too slow? Let me know!
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Today's Agenda

1. Quick Review: Starting a MTA Group
2. Finances: What You Need to Know/Do to Begin Collecting \$
 - Opening a Bank Account, Record Keeping, Non-Profit Organizations
3. Fundraising Ideas
4. Q & A
5. Next Steps



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Quick Review: Getting Started...

Resources and ideas: <http://movetoamend.org/start-group>

1. Form a group – hold an organizing meeting

- ✓ Easy to start with a group of friends
- ✓ We will publicize on MTA website and to petition signers in your area

2. Involve the public

- ✓ Bring a Move to Amend speaker for a public forum
- ✓ Host a Challenging Corporate Power, Asserting the People's Rights study group
- ✓ Gather signatures for the Move to Amend petition

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Affiliating with Move to Amend

Affiliation Process & Application:
(<http://MoveToAmend.org/affiliate>)

Our Goals for Affiliates:

- ✓ Coalition/Movement Building Emphasis
- ✓ Move to Amend name
- ✓ Growing the numbers through list sharing
- ✓ Democratic internal process
- ✓ Anti-oppression/Movement building organizing and power structure (<http://bit.ly/MTAmoveStrength>)
- ✓ Network and growth toward State Chapters

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Finances: Opening a Bank Account

Opening a Bank Account - In order for a group to open a bank account as a group entity (not just under the name of the treasurer) the bank will usually require at least four things:

1. A minimum balance
2. A copy of the group minutes of your business meeting that includes the name of your organization
3. A list of all officers of the organization and anyone else who may be a cosigner on the account, including some form of ID such as driver's license and Social Security Number on each person.
4. A Tax ID Number/ Employer ID Number for the organization.



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Finances: Obtaining a Tax ID/EIN Number

- Getting your group's own Tax ID Number/EIN is not difficult.
- Contact the IRS to request Form SS-4: "Application for Employer Identification Number."
 - You can order tax forms by phone at 1-800-TAX-FORM (1-800-829-3676).
 - Or apply online: <https://sa2.www4.irs.gov/modiein/individual/index.jsp>
- IRS does not require you to be incorporated to get a Tax ID Number/EIN. You fill in the application as a "nonprofit organization."



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Finances: Obtaining a Tax ID/EIN Number

Once you get your TIN/EIN, you are responsible for all legal and illegal use of the number. Following certain guidelines will help avoid problems:

- Number should not be "loaned" or otherwise used by any other group, or person.
- Maintain accurate records and paper trail. Examples of such records may include minutes of business meetings, any changes in officers, and financial records including receipts.
- If you change your address after you receive your EIN you must notify the IRS of the new address. Use Form 8822, "Change of Address."
- If the group should ever close, the group officers need to cancel their Tax ID Number/EIN with IRS by written notice when the bank account closes.



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Finances: Non-Profit Organizations

For purposes of getting a Tax ID Number/EIN:

- "Non-profit" org = major purpose or activity is to do things other than making money
- Not same thing as being a federally recognized non-profit org. That requires application to the IRS.



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Finances: Non-Profit Organizations, cont.

- Non-profit org is not expected to conduct its activities so that it does not have a "profit," (i.e. income that exceeds expenses) – excess income cannot individually benefit officers, directors or members.
- You may reimburse members for expenses incurred while conducting MTA business.
- Good idea to check with a legal and/or tax professional in your state for more info to determine if you need to make additional filings (if raising larger amounts of \$)
- “Nonprofit” does not necessarily = “tax exempt.” Becoming exempt from taxes requires considerable work and approval of that status by state tax agencies and the federal IRS.



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Finances: Tax Info

- MTA groups are "non profit" in their financial behavior but they are not automatically "tax exempt".
- Tax exemption status is expensive/complicated process that involves legal obligations and ongoing responsibility. Can also limit your activities in terms of lobbying or electioneering.
- MTA national is currently seeking our own 5013c and 501c4 status. We will keep our affiliates informed about what this means for you. In the meantime, we do not recommend seeking tax exempt status for individual affiliates.
- Once you raise or spend about \$5,000 we suggest you consult with a tax professional concerning what state or federal tax requirements apply to your group. We can help you if you have questions.



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Finances: State Sales Tax

- Sale of literature or other items may be trigger responsibility for paying sales tax on those items to your state.
- You can give away materials or accept voluntary donations to avoid triggering this requirement. (Offer T-Shirts or other similar materials to donors/members as a thank you gift.)
- If in doubt, we encourage you to ask other groups in your community or consult an attorney or tax professional.



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do hereby ordain and establish this Constitution for the United States
in Witness whereof, we have hereunto set our hands and seals, this 17th day of September, 1787.

Finances: Alternative to Getting a TIN/EIN for Bank Account

- You may use the social security number of a group member as the Tax ID for the group's bank account.
- You may open a checking account (noninterest bearing) under the treasurer's social security number with a Doing Business As (D/B/A) name on the account (such as "Humboldt Move to Amend").
- This could have tax implications for the treasurer – depends how much money is raised and spent.



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Fundraising 101

- People give when they are asked, and rarely give when they are not. Even when people are asked, they don't always give. So, you need to ask for more gifts than the number you need to bring in, and you need to be comfortable with people saying "No."
- Donors are not ATMs. You need to thank them and keep them posted on what your organization is doing with their money if you want them to give more than once.
- You can't raise all the money your group needs by yourself. Spend some time building a team of people to help you.

<http://www.grassrootsfundraising.org/howto/>

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A decorative scroll with the words 'We the People' written in a cursive font, reminiscent of the opening of the US Constitution. The scroll is partially unrolled and has a textured, parchment-like appearance.

Fundraising: Events

- Events can be a good way to raise funds but need to seriously weigh pros and cons:
 - Helps mobilize your base
 - Generate public attention
 - Also opportunity to educate
 - Set tone and message for your group/cause
 - Can be costly
 - Very costly in terms of time

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Fundraising: Events

Types of Events – some examples:

- Sporting, music, and cultural events
- Social events (dinners, dances, quiz tournaments, community picnics)
- Auctions and raffles
- Exhibitions, festivals, fairs, marches, demonstrations

Check out June 2011 Webinar Recording for creative event ideas that could be fundraisers (<http://MoveToAmend.org/webinars>)



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Fundraising: Direct Ask

- Like all organizing – RELATIONSHIPS are the key
- Goal is to build loyalty among individuals who are willing to donate – your group members, supporters, volunteers.
- Fundraise with a large base of fundraising volunteers



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Fundraising: Personal Ask

The personal ask is good because it is low cost and straightforward...

- Come up with list of people who might be willing to donate
- Ask for contribution – make a “strategic ask”
- If someone donates, remember to send a thank you note
- Make sure they know the donation isn’t tax-deductible



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Fundraising: Personal Ask, tips

- Recruit others for a fundraising team – the more people, the more potential contacts and donors.
- Draft a sample letter and response form.
- Make sure volunteer/recruit team is consistent on wording of letters/phone calls.
- Send letters and make follow up calls.

Other ideas (non events): phonebanking, door-to-door fundraising. Both can require more resources, more time, and more training.



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Fundraising: In Summary

- ✓ **Make Goals and Plans.** Work backwards once your goals are set.
- ✓ **Keep Accurate Records.** Cover your butt, and analyze your results.
- ✓ **Make it Personal.** People give to people.
- ✓ **Involve Everyone.** Never turn down an offer to help, build investment.
- ✓ **Make it Fun.** Be thankful!

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Good Resources for More Info

Grassroots Fundraising Journal

<http://www.grassrootsfundraising.org>

National Resource Center

<http://www.ccfbest.org>

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Next Steps...

- **Complete the survey** at the end of this webinar so we can best assist you
- **Next webinar** will be the first Tuesday of next month:
Tuesday, October 4th at 4pm PT / 5pm MT / 6pm CT / 7pm ET – mark your calendars! Topic is "**Using Elections as a Platform for MTA.**" We'll cover ways to use local and state elections as way to get Move to Amend in front of voters, the media and candidates running for office in your community.
- **Contact Move to Amend** if you have any questions:
→ info@MoveToAmend.org or (707) 269-0984

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