



HOW TO START A CAUCUS AND 10 WAYS TO BREAK IT UP

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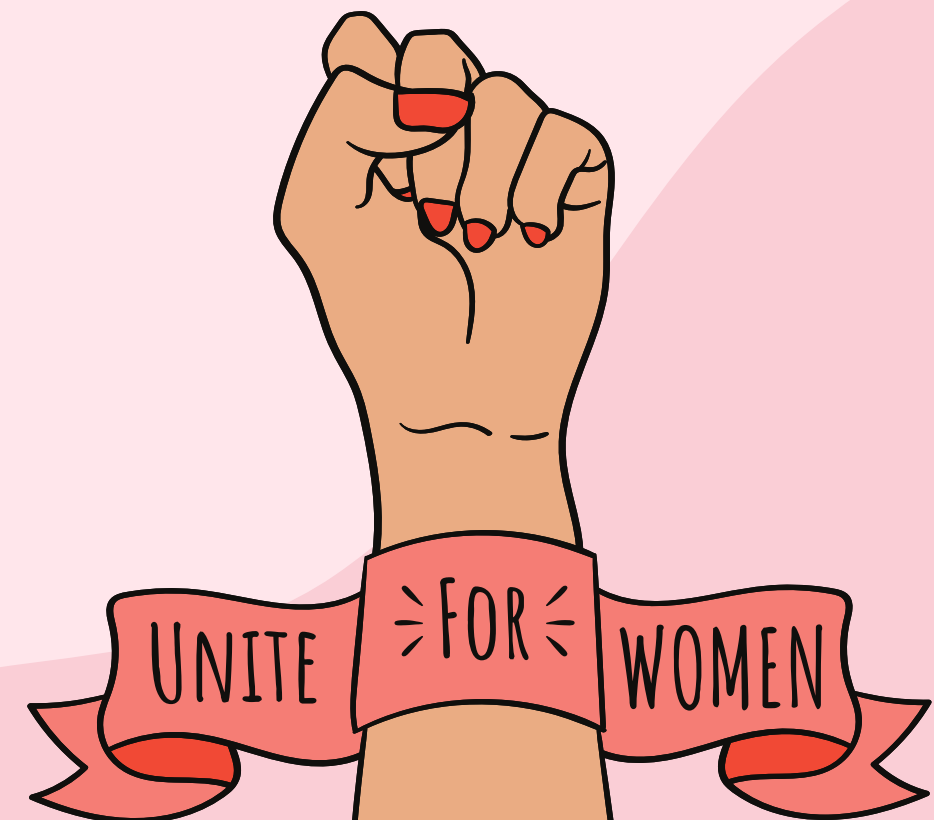




WHAT IS A CAUCUS?



A caucus is an organized group of union members united by shared interests and committed to leadership development, education, advocacy, and community engagement.





WHY FORM A CAUCUS?

- **Building Leadership**
- **Increase Member Engagement**
- **Support Union Priorities**
- **Develop Future Leaders**
- **Strengthen Community Partnerships**





DEFINE THE STEPS

Step 1: Define the Purpose

Identify the caucus mission, goals, and intended membership.

Step 2: Form an Organizing Committee

Recruit 5-10 committed members to assist with launching the caucus.

Step 3: Research Union Requirements

Review local bylaws, constitution, and approval procedures.



DEFINE THE STEPS

Step 4: Draft a Mission Statement

Develop a concise statement outlining the caucus purpose and objectives.

Step 5: Develop Bylaws

Establish rules governing membership, officers, elections, meetings, finances, and amendments.

Step 6: Seek Official Recognition

Present the proposal to the Local Executive Board and membership for approval.

IRS REQUIREMENTS



Obtain an EIN if opening bank accounts or managing funds.

Establish Non-Profit Status



<https://www.irs.gov/charities-and-nonprofits>

<https://www.irs.gov/charities-non-profits/other-tax-exempt-organizations>



Local Union should be a 501(c)5

Local Caucus should be a 501(c)7

DIFFERENCES BETWEEN THE TYPES
OF 501(C) ORGANIZATIONS.





BANKING REQUIREMENTS

- Determine whether nonprofit status is necessary.
- Maintain accurate financial records.
- File all required federal and state reports.



Bylaws



- Obtain an Employer Identification Number (EIN).



Meeting Minutes Authorizing the Account



Authorized Signers

- Government-Issued Identification
 - President/Chair and Financial Secretary-Treasurer signatures
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SUGGESTED OFFICER STRUCTURE

President

Vice President

**Recording
Secretary**

**Financial Secretary-
Treasurer**

PROGRAMMING & ACTIVITIES



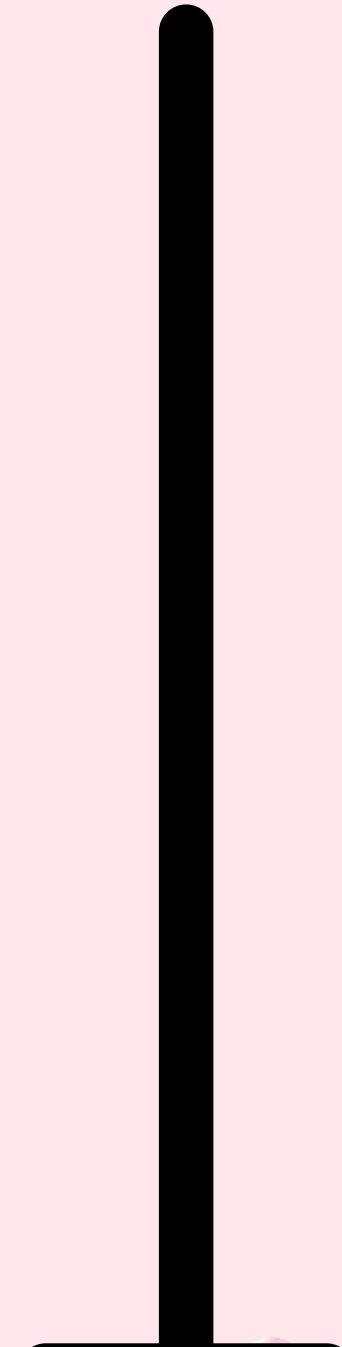
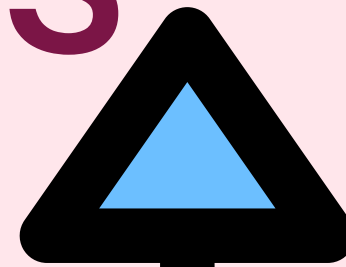
- ✓ Leadership Development
- ✓ Community Outreach and Mentoring
- ✓ Scholarships Programs
- ✓ labor Education
- ✓ Legislative and Political Advocacy

10 WAYS CAUCUSES FAIL



1. Poor Communication
2. Unclear Mission
3. Lack of Accountability
4. Leadership Conflicts
5. Weak Succession Planning
6. Failure to Recruit New Members
7. Poor Financial Management
8. Lack of Transparency
9. Resistance to Change
10. Failure to Follow Bylaws

NEXT STEPS



Organize

Recruit Members

Adopt Bylaws

Launch Your Caucus

THANK YOU

Q & A

