



**Rocky Mountain  
Farmers Union**

# **Officer Handbook**

*Revised March 2023*

# Rocky Mountain Farmers Union

## Officer Handbook

We are Rocky Mountain Farmers Union, and for over 115 years we have advocated for family farmers, ranchers, and agricultural workers. We are dedicated to preserving the agricultural way of life and serve as a home for all producers, whether long-established or at the start of their agricultural journey.

As a chapter officer, you represent Rocky Mountain Farmers Union (RMFU) in your community. Your leadership and service are vital to the success of RMFU both as an organization and as an advocate for your community. Officers are the local face of Farmers Union, and the chapter activities they choose to pursue define and drive how RMFU's impact is felt by the public.

Grassroots advocacy begins at the chapter level with officers at the forefront. Members should bring their individual voices to the table and trust that leadership will carry it forward on their behalf. Further, officers who play an active progressive role in their area will see their membership grow as people seek to join a positive and action-oriented group of people.

This manual is intended to guide your organizing efforts toward success. That said, creativity and capitalizing on the unique strengths within your specific communities may present further opportunities for organizing that are welcome to be explored.

For further support or inquiries, reach out to your regional Membership Coordinator:

Sara Mayer  
Wyoming and Eastern Colorado  
Sara.mayer@rmfu.org

Jen Ghigiarelli  
Western Colorado and New Mexico  
Jen.ghigiarelli@rmfu.org

To see a complete listing of current RMFU staff who are available as a resource to you and your chapters, see our website at <https://rmfu.org/about-us/staff/>

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## I. General Chapter Organization

Chapters of Rocky Mountain Farmers Union are typically organized under the leadership of four officer roles: **President, Vice President, Secretary, and Treasurer**. These roles are nominated and elected to office by chapter membership during county conventions in the fall.

Some chapters may have less than four officers at the helm – ex: President, Secretary, and Treasurer; or President, Secretary/Treasurer; or President/Treasurer, Secretary. However, it is recommended to divide roles up between more individuals, when possible, to spread workload, avoid burnout, and empower more people in your community to take on leadership experience.

There may be other leadership positions held in the chapter beyond officer roles. We encourage the establishment of committees and chairs to lead them where appropriate; for example, education chair, policy chair, cooperative chair, publicity chair, etc. These roles may be elected or appointed. The structure and management of these committees may be decided on a chapter-by-chapter basis. Committees may be formed and/or dissolved on an annual basis or as needed once their purpose has been met. We encourage officers to reach out to their Membership Coordinator with their interest and we will be happy to provide resources and guidance.

## II. Chapter & Officer Expectations

- Maintain a quorum of at least 5 dues paying members
- Officers must be regular dues paying members of RMFU
  - o All officers to engage in planning, organizing, attending, and facilitating meetings and events to the full extent possible
  - o Be supportive of each other: ask for help if you need it, offer support to other co-leaders if they need it
- Hold at least 1 public meeting per year to receive a tier 1 payment
  - o See Section VIII. Chapter Payments
- Hold at least 4 events per year to receive a tier 2 payment
  - o See Section VIII. Chapter Payments
  - o Additional events and activities are incentivized by higher payments from RMFU to chapter bank accounts
  - o Meetings should be well-planned and interest the members
    - It can sometimes be more effective to have fewer meetings that deliver greater value to members.
- Provide at least 7 days' notice to members before an event or meeting via public posting or listserv
  - o RMFU Communications Team provides an [event submission link](#) at [rmfu.org](http://rmfu.org) for our website and social media outreach
  - o Contact your Membership Coordinator to generate an email listserv for local membership outreach
  - o Maintain current listservs and add new contacts collected from event sign in sheets
  - o Maintain transparency in your role and be a mentor for members who may want to become a future leader
- County Convention to elect officers and RMFU Convention delegates to be held annually
  - o County Convention shall occur in the fall by October 20th
  - o See Section XI. County Convention Checklist
  - o Officers and/or regular dues paying chapter members to represent as delegates at RMFU Convention in the month of November when possible
- Bolster membership recruitment and retention
  - o Embody positive leadership and be a connective support person in your communities
  - o Ensure that members are all given equal opportunity to have their voices heard
  - o Be responsive in communications
  - o Direct members with questions to the appropriate leader
  - o Follow up with event attendees who are new and interested to let them know how they can stay involved or deepen involvement
  - o Add interested community members and event attendees to relevant listservs and modes of outreach
  - o Encourage event attendees to become dues paying members
  - o Seek out facilitation and mediation should conflict occur
- Maintain an open line of communication with RMFU staff



### III. President Role

#### Characteristics of a Chapter President

- **Motivator.** Challenge and encourage other members to play an active role in the organization and see that they are equipped with the information and skills to do so.
- **Informed.** Keep up on local, state, and national activities of the Farmers Union and current events impacting your communities. Bring requests for action to the attention of your chapter's membership.
- **Integrity.** Set an example for positive leadership, transparency, inclusivity, and non-partisanship as a representative of the Farmers Union.

#### Expectations of a Chapter President

- Participate in planning and organizing meetings
- Provide at least 7 days' notice to members before an event or meeting via public posting or listserv
- Provide 14 days' notice to communications
  - o RMFU Communications Team provides an [event submission link](#) at rmfu.org for our website and social media outreach
  - o Work with secretary and RMFU to access membership lists to communicate meetings and share information
- Make and distribute agendas for the meetings at least 24 hours in advance
- Preside as chair during meetings or delegate substitute chair role
  - o Maintain order
  - o Understand and use Robert's Rules when conducting official business
  - o Keep meetings running on schedule
  - o If unable to attend meeting, inform Vice President or appoint another officer to lead
- Bolster membership
  - o Attend all chapter events and meetings when possible
  - o Ensure that members are all given equal opportunity to have their voices heard
  - o Be responsive in communications
  - o Follow up with event attendees who are new and interested to let them know how they can stay involved or deepen involvement
  - o Add interested community members and event attendees to relevant listservs and modes of outreach
  - o Refer event attendees to become dues paying members
- Participate in RMFU's policy setting processes at the county and state level
  - o Assist with County Convention and see that members feel informed of the process
  - o Approve and submit the chapter's delegate selection for RMFU Convention by the 1<sup>st</sup> Monday of November





## IV. Vice President Role

### Characteristics of a Chapter Vice President

- **Integrity.** Set an example for positive leadership, transparency, inclusivity, and non-partisanship as a representative of the Farmers Union.
- **Supportive.** See that all officers are feeling empowered to fulfill their duties and provide additional support when necessary. See that all members and event attendees feel welcomed.
- **Motivator.** Challenge and encourage other members to play an active role in the organization and see that they are equipped with the information and skills to do so.

### Expectations of a Chapter Vice President

- Take on the role of Chapter President in the event of vacancy for any reason
- Participate in planning and organizing meetings
- Assist President in maintaining order in meetings
  - o Understand and assist President in using Robert's Rules when conducting official business
  - o Keep meetings running on schedule
- Run meetings in absence of the President
- Chapter Reporting
  - o Verify that Secretary and Treasurer Officers are meeting reporting regulations
    - Ex: Sending out minutes in a timely manner; Event Reporting throughout year; Financial Reporting at end of year
- Bolster membership
  - o Attend all chapter events and meetings when possible
  - o Ensure that members are all given equal opportunity to have their voices heard
  - o Be responsive in communications
  - o Follow up with event attendees who are new and interested to let them know how they can stay involved or deepen involvement
  - o Add interested community members and event attendees to relevant listservs and modes of outreach
  - o Refer event attendees to become dues paying members

## V. Secretary Role

### Characteristics of a Chapter Secretary

- **Organized.** Strong note taking and thorough reporting skills.
- **Responsive.** Timely communications around chapter happenings and meetings minutes.
- **Informed.** Keep up on local, state, and national activities of the Farmers Union and current events impacting your communities. Bring requests for action to the attention of your chapter's membership.

### Expectations of a Chapter Secretary

- Participate in planning and organizing meetings
  - o Work with president and RMFU to access member lists to communicate meetings and share information
- Record detailed minutes of meetings
  - o Report minutes back out to membership within 1 week following the meeting or event
  - o Note and follow up on items that arise and require addressing in future meetings
  - o Keep all meeting minutes on file for future reference
  - o Delegate notetaking to another officer if unable to attend meeting
- Assist President and Vice President in maintaining order in meetings
  - o Understand and assist President in using Robert's Rules when conducting official business
  - o Keep meetings running on schedule
- Record all vote tallies and decisions
  - o Determine quorum
  - o See that all decisions are made public
  - o Inform RMFU of officer and delegate election results post County Convention, with accurate contact information (phone, email, address) for all elected members
  - o Update any Chapter Operating Policies with relevant voted items passed by membership
- Submit Event Reports to RMFU for annual chapter activities reimbursement
  - o Tracks all formal chapter meetings annually, including workshops, tours, potlucks, panels, elections, listening sessions, public meetings, etc.
  - o RMFU rewards greater chapter activity at a higher funding tier
    - See Section VIII. Chapter Payments
  - o [Submit online at rmfu.org](http://rmfu.org)

## VI. Treasurer Role

### Characteristics of a Chapter Treasurer

- **Orderly.** Ensure the chapter's financial records are accurate and up to date, and process payments in a timely manner.
- **Responsible.** Capable of handling figures, cash, and budgeting in sound and ethical ways.
- **Strategic.** Advise spending in ways that consider cash flow and manage financial risk and return for the chapter.

### Expectations of a Chapter Treasurer

- Participate in planning and organizing meetings
- Assist President and Vice President in maintain order in meetings
  - o Understand and assist President in using Robert's Rules when conducting official business
  - o Keep meetings running on schedule
  - o Perform duties of President and Vice President in their absence
- Oversee the Chapter bank account
- Oversee finances, which may include, fiscal sponsorship, donations, and accounts payable/receivable
  - o If setting up new bank account, submit Direct Deposit Authorization to RMFU
- Submit Financial Reporting Form to RMFU by January 15<sup>th</sup> for previous year
- Coordinate with RMFU to receive chapter payments by Jan 31<sup>st</sup>
- Be prepared to provide an update on chapter finances at the beginning of chapter meetings or as requested by any chapter dues paying member

## VII. Role of Committees

Committees may be appointed or elected within chapters to delegate responsibilities and actions toward a focused end. Committees may be formed and/or dissolved annually or as needed once their purpose is met. The focus of a committee can be as varied and creative as is helpful to the chapter, but some examples include:

- Education
- Policy
- Co-op
- Energy
- Equity and Inclusion
- Western Water
- Land Access
- Community outreach

Committees are to be led by an appointed or elected Chair to ensure responsibilities are met.

### Expectations of a Committee Chair

- Attend all chapter events and meetings when possible, including officer meetings
- Hold at least one meeting annually to discuss goals and delegate actions
  - o Follow up as needed with committee members to see goals are met
- Report committee activities at chapter meetings or as requested by dues paying members
- Fulfill any further expectations agreed upon by chapter leadership

## VIII. Chapter Payments

Chapter Payments are calculated based on activity from January 1<sup>st</sup> through December 31<sup>st</sup> of the previous year, with payment provided to the chapter between January 1<sup>st</sup> and January 31<sup>st</sup> of the current year.

Requests for additional bonus funding may be submitted between January 1<sup>st</sup> through February 15<sup>th</sup> for the upcoming year's activities, with approvals being made and payments provided to the chapter by February 28<sup>th</sup>. Officer planning meetings in January are an ideal time to discuss and decide requests for additional bonus funding.

Chapter Payments fall into one of two tiers:

- Tier 1 – Payment of \$150.00 from RMFU to chapter bank account
  - 1 annual meeting held
    - Quorum of 5 dues paying members
    - Election meeting
    - 1 member sent to a state or national event
- Tier 2 – Payment of \$500.00 from RMFU to chapter bank account
  - 4 or more meetings held throughout the year
    - Quorum of 5 dues paying members
    - Election and delegate selection for RMFU Convention
    - At least 1 member sent to a state or national event
    - At least 2 meetings open to the public
    - 1 co-op event attended by at least 1 member
      - RMFU Cooperative Development Center meeting/training
      - Participating on local co-op board or in meeting
      - Engagement with local cooperative projects
- Chapter Activity Bonus Fund
  - Additional funding may be requested by chapter leadership and considered by RMFU on a case-by-case basis to allow additional or larger engagement activities to be pursued beyond the base payments provided in the tier system (whether Tier 1 or 2)
  - Requests for bonus funding to take place annually between January 1-February 1
  - Bonus funding decisions to be prioritized toward activities that:
    - Further diversity, equity, and inclusion initiatives or directly support underserved communities
    - Engage with an RMFU department (Education, Cooperative Development Center)

- Ex: Hosting a local day camp or donating a scholarship for a youth member to attend RMFU Cooperative Leadership Camp
  - Engage with an RMFU special project (AgWell, Drought Advisors)
  - Involve a FUSA Insurance agent
  - Engage with the broader public and bolster membership
- Bonus funding decisions to be prioritized toward chapters that:
  - Have participating members in fellows or youth camps for a given year

## IX. Chapter Spending Guidelines

To remain a tax-exempt organization under 26 USC § 501(c)(5) as an agricultural organization, RMFU Chapters opening accounts under the RMFU FEIN must only spend funds in these accounts on activities consistent with those activities permitted to be conducted by an agricultural organization.

Any member can suggest ways for chapter funds to be utilized, to then be voted on by full dues paying members of the chapter.

### **Money May NOT Be Used For:**

- Lobbying, supporting political candidates (including campaign contributions) or other political matters.
- Gifts to others (whether or not they are members of RMFU Chapter).
- Loans to others (whether or not they are members of RMFU Chapter).
- Personal matters not related to RMFU Chapter business.
- Providing services exclusively to particular people
- Horse racing or any other gambling, game of chance
- Organizing growers, processors, and distributors to promote the sale or use of a processed agricultural product.
- Supplying labor to farmers and growers.
- Exclusively benefiting members (For example, an organization lost its tax-exempt status by putting on a farmer's market where only members of the organization could be vendors).

In general, money should not be used for matters that exclusively benefit members (e.g. to only support member farms, produce, products and services), and should be used for the betterment of the agricultural community as a whole, including making agricultural products in general more efficient, of better quality, and more accessible to communities or to benefit those who practice, horticulture, and aquaculture (regardless of whether they are members).

### **Money MAY be used for:**

- Reasonable operating costs.
- Travel expenses to and from RMFU events.
- Outreach regarding agricultural activities.
- Education, including training sessions for members of the agricultural community.
- Matters that benefit agriculture in the general community.
- Improving the quality of agricultural products.
- Bettering the conditions of those in the agricultural community.

**Additionally, please report any planned sales of tangible personal property to Sara Mayer or Jen Ghigiarelli ahead of time. That means:**

- Silent auctions
- Bake sales
- Any other sale of a moveable object (like household goods, clothing, computers, or farm equipment)

It is okay to plan these events, we just need to keep track of how many of them are happening every year.

This reporting requirement does not include selling tickets to events – such as if you invite someone to come speak to your chapter or decide to host a farm to table dinner in the community for which you sell tickets.

#### **Donations or Ticket Sales are Not Tax Deductible**

Finally, even though the organization itself is tax exempt, donations to the organization are NOT tax deductible. So, you cannot promise that to folks who want to come to your events, host a fundraiser, or donate an item to a silent auction that they can write this off on their taxes.

**Remember, if you have any questions, the best thing to do is just ask.**



## X. Required Reports

Reporting is essential to keep records of chapter activities, for accurate provision of annual payments from RMFU to chapters, and to ensure that RMFU as an organization remains compliant with applicable laws and financial regulations.

### **Event Submission** (before event)

- Provide at least 14 days' notice before an event or meeting to RMFU Communications team
  - o [Submit online at rmfu.org](https://www.rmfu.org)
  - o RMFU Communications Team will generate media and postings across our website and social media outreach, and can send postcards with enough notice
- Provide at least 7 days' notice before an event or meeting your membership lists and your Membership Coordinator
- The president is responsible for this pre-event work.

### **Event Report** (after event)

- Submit Event Report to RMFU to be counted toward annual Chapter Payment
  - o Responsibility of Secretary Officer, to be confirmed completed by Vice President Officer
  - o Tracks all formal chapter meetings annually, including workshops, tours, potlucks, panels, elections, listening sessions, general public meetings, etc.
  - o RMFU provides chapters additional payments to reward activity
    - See Section VIII. Chapter Payments
  - o [Submit online at rmfu.org](https://www.rmfu.org)

### **Financial Report**

- Submit Financial Reporting Form to RMFU by January 15<sup>th</sup> for previous year
- Responsibility of Treasurer Officer

## XI. County Convention Checklist

County Convention is an important event to be held annually in the fall – preferably by October 20<sup>th</sup>. Chapters should work to ensure member attendance through event promotion, and RMFU staff will assist in this.

Elections are to take place at the convention for chapter officers, and for delegates to be sent to RMFU Annual Convention the following month in November.

- Officer elections may take place on an annual or biennial basis according to chapter preference
- All officers and delegates selected must be regular dues paying members
- RMFU staff should be present and supply Officer Forms and Delegate Credential sheets to be filled out, signed, and submitted by chapter officers.
- If any board member seats are up for election at RMFU Annual Convention that year, candidates for these seats may additionally present their platform for consideration to members at County Convention via recording, virtually, or otherwise.

Officers should be prepared to follow Robert’s Rules of Order in conducting the official business of election and delegate selection

On delegate allotment across chapters:

*“Every chartered County Union will be allowed two delegates, if it has at least five (5) dues-paying members in good standing. One additional county delegate will be allowed for each additional ten (10) dues paying members in good standing or major fraction thereof, less the total number of local delegates within the County Union, such county delegates to represent as many areas of the county union as possible. County Unions will be allowed one (1) additional delegate, if the County Union has a membership increase over the previous year. County Unions will also be allowed one (1) additional delegate if the County Union completes the following activities: a) holds an annual meeting; b) has at least one member participate in a State, Regional, or national farmers Union event.”*

An overview of RMFU Annual Convention and delegate expectations will be delivered for members who may be unfamiliar with the process by RMFU staff and give any highlights for the upcoming event – such as speakers, topics, and issues expected to be addressed.

If delegates are to be sponsored in any amount by chapter funds to participate in RMFU Annual Convention, the Treasurer should confer with all other officers prior to County Convention to agree upon the amount of funding to be offered and the process for reimbursement.

County Convention may also be an appropriate time for the Treasurer to recommend amount of funding if any to be donated toward the RMFU Foundation Gala which takes place at RMFU Annual Convention

- The RMFU Foundation is a 501c3 nonprofit organization that offers educational programs to not only our members but a broad base of interested people in the Rocky Mountain region
- Funds raised at the annual RMFU Foundation Gala goes to support programs like youth camps and Fellows, among others
- Often chapters will present baskets of local items toward this cause, or directly offer donations
- Members may vote to agree upon amount spent and means of delivery