

Secretary/Treasurer

In most Farmers Union states, the jobs of Secretary and Treasurer are combined into a single position. The handling of membership records--a secretarial function--and membership dues--a financial function--seem to go together naturally. A combined Secretary/Treasurer position may make the handling of the written records of the organization easier to coordinate. In some instances, however, the jobs are split between two different individuals--one handling the financial records and another handling the written records of the organization. Encourage the separation of these jobs, as this is a very good way of getting more people involved.

The person who holds the double-billed position of Secretary/Treasurer has several important duties and responsibilities. What follows is a fairly long list of these duties. It may appear daunting at first, but it is manageable providing the office holder keeps them up regularly.

Combined Position Duties:

- **Assisting the President.** In many instances the President delegates to the Secretary/Treasurer responsibility for the following:
 - Notifying the membership and others of the time and place for both regular and special meetings.
 - Having on hand at each meeting a copy of the constitution and by-laws, a book on parliamentary procedure and a copy of the current official policy document of both the division and National Farmers Union.
- **Ordering supplies and materials.** Many organizations have adopted a uniform procedure for ordering supplies needed by the various officers in carrying out their responsibilities. This procedure often involves:
 - Receiving orders for educational materials, recreational materials, organizational materials, etc. from the officers who need these items in their work.
 - Bringing the request before either the appropriate officers or membership for approval in cases where a substantial expense is involved.
 - Ordering the supplies from the national office or other source.

Secretary's Duties:

- **Recording the minutes of the organization's meeting and presenting them at the following meeting.** The minutes should include:
 - The name of the group, meeting time and place.
 - The kind of meeting (regular or special).
 - Name of the presiding officer.
 - The number of people present. (At times it is desirable to take a roll call and minutes should contain the names of guests).
 - Action on minutes of the previous meeting (adoption or amendment).

- Action on the Treasurer’s report.
- Main motions written word for word as stated by the proposer. Routine motions do not require recording the names of the mover or seconder. Motions dealing with policy or spending money should include the names of the mover and seconder. Records should be made of the decisions on all motions and the number of affirmative and negative votes on important issues.
- A summary of what was discussed during the meeting including any action proposed, committees appointed, guest speakers or panelists, etc.
- A summary of the remainder of the program.
- The motion to adjourn and time of adjournment.
- Taking care of all correspondence.
 - Routine letters should be answered promptly.
 - Important mail should be discussed with the division’s officers and then discussed with the membership if the leadership deems it of enough importance.
- Reporting division’s activities to the national office.
 - Following elections or any changes in officers, the names should be reported immediately to the national office. The information should include names, addresses and telephone numbers, including FAX and e-mail addresses.
- Membership records should be kept up-to-date, and changes should be sent to the state office as required by established procedures.

Treasurer’s Duties:

- Developing a budget. This should be done with the advice and consent of the Executive Committee.
- Paying promptly the division’s bills as approved for payment by the membership.
- Keeping the division’s financial records and reporting on them at each meeting. The financial records should include receipts and disbursements, including the balance on hand in the organization’s account. A sample financial report follows:

Financial Report for the period ending _____, 20__

Receipts

Balance on hand, June 1, 20__	\$ 84.96
Dues collected, June 1 to June 30.....	\$ 50.00
Funds from Box Social Auction, June 13	<u>\$ 23.14</u>
Total.....	\$158.10

Disbursements

Stationery and Postage	\$ 8.36
Educational materials	\$15.00
Contribution to National Legislative Fund	<u>\$50.00</u>
Total.....	\$73.36
Balance on hand, July __, 20__	\$84.74

Helpful Hints for the Secretary/Treasurer

- Always come to the meeting prepared so time is not wasted while you search for letters or arrange the last meeting's minutes.
- Have the minutes written in a complete form and open for reading as soon as the meeting starts. Notes jotted on the back of an envelope or some other piece of paper are not meeting minutes and should not be accepted in that form.
- Keep a large loose-leaf notebook in which to store letters. Take the notebook with you to meetings.
- When the meeting must consider the content of any letters, read aloud only the portion of the letter that is of concern to all members, and which must be read in detail. The reading of long, dull letters will destroy the interest of most members and ruin the pace of the meeting. You can post the letter on a bulletin board for those who are interested in reading the entire letter.
- Always bring to the meeting a copy of the organization's constitution and bylaws and a book on parliamentary procedure with which to resolve any disputes which may arise on the manner of conducting business.