

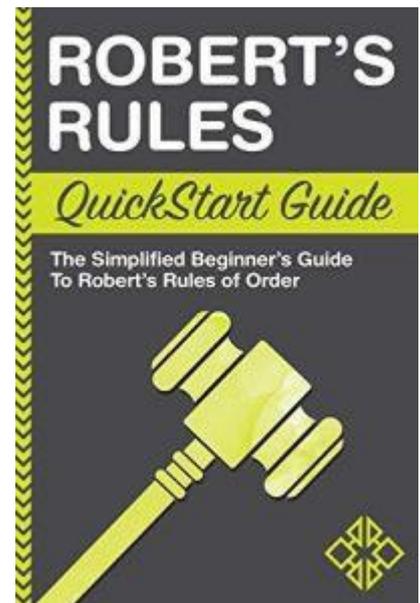
Robert's Rules

QuickStart Guide - The Simplified Beginner's Guide to Robert's Rules of Order

ClydeBank Business

Recommendation

Rooms full of smart people can devolve into chaos if you don't adopt an orderly approach to meetings. Whether you want to organize a community initiative or hold more productive committee or board meetings, ClydeBank's simplified interpretation of the latest (2011) edition of *Robert's Rules of Order* helps you keep gatherings on track and orderly. American army colonel Henry Martyn Robert created *Robert's Rules* in the late 1800s, and these standards remain in wide use today. Put them into practice to enable your group to share ideas, avoid abuses of power and embrace transparency.



Take-Aways

- Smart people waste time at meetings when their egos clash.
- Follow Robert's Rules in meetings to launch a new organization or restructure a disorderly one.
- Bylaws and rules of order are foundational to any group's operations.
- Use a five-step agenda to ensure engaging and productive meetings.
- Call on your group to take action by putting forth motions.
- Strong committees can inform larger groups about key decisions by issuing thoughtful reports.
- Meetings which lack an effective chairperson can become chaotic.
- Prevent people from burning out or dominating meetings.

Summary

Smart people waste time at meetings when their egos clash.

Even well-intentioned, bright people may waste time at meetings because they want to push their agendas forward, get excited about their ideas and don't trust their colleagues to get around to things that matter to them. Egos and diverse points of view can collide, but you don't have to live with disorder or chaos. There's a better way to proceed.

In the late 1800s, US Army colonel Henry Martyn Robert wrote a guidebook outlining a methodology for organizing meetings of any size. He originally titled it the *Pocket Manual of Rules of Order for Deliberative Assemblies*, then later, *Robert's Rules of Order*.

"The sad truth is that when too many big brains are in one room, they're likely to suffer wasteful clashes of ego when they should be bursting at the seams with brilliant ideas."

Robert's guide book was – and continues to be – widely popular. Publishers have issued 11 different editions and sold millions of copies. Robert's Rules can help you hold productive and efficient meetings, define your organizational structure, and otherwise allow your group or company to conduct itself with dignity and professionalism.

Follow Robert's Rules in meetings to launch a new organization or restructure a disorderly one.

Follow these five steps to lead meetings to reinvigorate an existing organization that lacks a proper structure, keep a strong company humming or create a new organization:

1. **Call your first organizational meeting** – To launch a new corporate initiative, activate a project committee, organize a group of citizen advocates or create a condominium owners' association, invite people to a mass meeting.
2. **Elect temporary officers** – Elect a temporary chairperson, or chairman pro tem. This person designates other temporary officers, such as a secretary pro tem to take notes and a treasurer pro tem if the group needs someone to collect funds.
3. **Write a "Resolution for Permanent Association"** – This sets out your reasons for assembling. If you're the temporary chairperson, read this resolution and give people a chance to debate it, making sure nobody dominates the conversation. If you are creating a free-standing organization, create a formal resolution using the following template: "Resolved: Given the concerns expressed in this meeting, an association should be formed to address [the specific cause or issue your organization aims to tackle]."
4. **Create bylaws** – If you are forming an independent organization, create bylaws to ensure everyone aligns with the group's norms and plans. The temporary chairperson appoints people to sit on a committee that drafts the bylaws. If

necessary, propose to reimburse these committee members for a set amount of expenses they might incur, for example, for research or copying. Give everyone a chance to offer their thoughts on what bylaws the committee should draft.

5. **Wrap Up** — Set a time for your next meeting when the bylaws committee will share its draft.

Bylaws and rules of order are foundational to any group's operations.

Help your group achieve its mission by creating rules of order and bylaws that generate order and structure. Your group should draft bylaws – specific rules that help govern its behaviour, and it should create rules of order to make sure meetings function smoothly.

Follow the basics of Parliamentary Law. For example, while all members have a right to put forth motions and attempt to create new directives for the group, the majority rules. The group can stop a debate if two-thirds of the members decide to switch topics. Your group will develop its own habits and ways of getting things done; these approaches will become your customs.

“While structures like Robert’s Rules can guide your organization toward fair, orderly and reasonable action, you must never forget that the rules aren’t the point of assembly. The point of assembly is your...association.”

Follow this structural hierarchy when creating a system of rules and regulations: Charters supersede bylaws; bylaws outrank rules of order; and your group can create special rules of order that hold more authority than general rules of order, which you’ll typically draw from parliamentary authorities or *Robert’s Rules*.

Follow the *Robert’s Rules’* bylaw recipe of meaningful items when creating bylaws:

1. **Name** – Specify the name of your group.
2. **Object** – Include two sentences about your group’s purpose.
3. **Membership** – Explain how you establish membership: Do members need certain qualifications? Include details such as hierarchies of membership, initiation procedures and requirements of members such as dues and penalties for failing to meet requirements.
4. **Officers** – Explain the officers’ roles and the nominating process, specifying details such as the length of their terms.
5. **Meetings** – Clarify how your group sets meeting times; who’s responsible for scheduling; the minimum number of members required for an official meeting; where you will meet; and the length of meetings.

6. **Executive board** – Clarify the function of your executive board and its powers and capacities. Share details about how your group will appoint board members and structure board meetings.
7. **Committees** – Name each committee and write down its purpose, powers and any important details relating to its membership processes.
8. **Parliamentary authority** – Codify that the group will “refer to *Robert’s Rules of Order Newly Revised 11th Edition*,” or cite another authority.
9. **Amendment** – State that two-thirds of group members must vote to change a bylaw or have your group write its own rule regarding amendments.

Use a five-step agenda to ensure engaging and productive meetings.

Your bylaws can determine the frequency of regular meetings and your definition of a quorum: the minimum number of members required to hold a meeting. Groups often use their standing rules to dictate when and where they’ll meet. Encourage all members to attend regular meetings, while special committee members or board members can meet in smaller assemblies.

“Make sure that no one sucks all the oxygen out of the room, and make sure the meeting stays on track.”

If you can’t accommodate a specific concern during your regular meeting – such as a business item that demands the group’s immediate attention – the chair can call a special meeting. The chair should focus these meetings only on the issue under debate, and give members the information they need to participate knowledgeably. If you don’t reach a decision before the designated time lapses, you will need to schedule a continuation of the adjourned meeting. During this meeting, you will pick up where the last meeting on the subject ended and resolve the issue. Other types of meetings include executive sessions – which are members-only meetings – and annual meetings, which give executive board members opportunities to reflect on the organization’s goals and health.

Create your meeting agenda in five steps:

1. **Call to order** – Your presiding officer lets everyone know official business has commenced.
2. **Opening ceremonies** – Perform any rituals your group embraces, such as an invocation or introductions.
3. **Attendance** – A secretary or presiding officer calls the roll.
4. **Consent calendar** – Group members share anything they feel the group should know, but find is too trivial to warrant formal discussion as an official business item.

5. **Standard order of business** – Run the main part of your meeting in the following order: Someone reads or summarizes the minutes from the last meeting for the group’s approval. The officers, standing committees and boards share any reports they have prepared. Special committees share their reports. The group hears any special orders or presentations on scheduled topics. The group hears general business orders, or those it postponed or suspended debating in the last meeting. The chair opens the floor to new business any member would like to discuss. The chair then entertains a motion to adjourn.

Call on your group to take action by putting forth motions.

Individuals can make motions during deliberative assemblies (meetings). They can bring attention to items of business by addressing the chair or the presiding officer.

“Motions are debated, voted on, amended, and otherwise thrown around in most parliamentary systems, including Robert’s Rules. They are, in fact, the lifeblood of parliamentary process, the vehicle through which everything else flows.”

A main motion calls on the group to take an action; a secondary motion helps the group optimize the execution of the main motion. There are three main types of secondary motions:

- **Subsidiary motion** – For example, if the group considers a main motion to buy something with its funds, someone could make a subsidiary motion to postpone the purchasing decision in the main motion.
- **Privileged motion** – This applies when someone feels an urgent, unrelated need to stop or pause the meeting while the group debates a main motion. Examples include moving to adjourn or a motion that raises “a question of privilege,” such as asking the group to pause to adjust the temperature of the room.
- **Incidental motion** – These motions encompass how your group runs its meetings and refers to its rules and special rules of order. For example, someone could make an incidental motion asking to suspend a rule for a specific occasion, perhaps to allow a visitor into a meeting. Other incidental motions include nomination motions – which members make when electing new board members – requests for a release from serving on a specific matter or requests to resign.

The chairperson should permit the debate of a main motion only if one or more people seconds the motion. The individual making the main motion must defend it first, before the chair puts the question to the group and calls for a vote.

Strong committees can inform larger groups about key decisions by issuing thoughtful reports.

Select people to serve on committees – smaller groups within your main group – whose skills and talents best serve each committee’s specific tasks. Special committees exist for a temporary, fixed duration and report on or investigate a specific issue; standard committees serve long-term recurring functions. Your group may designate the overall chair to run committee meetings or appoint someone – ideally, someone knowledgeable about the committee’s subject area – to run each committee. When electing committee members, decide between using a secret-ballot method or the less formal tactic of open nominations.

“Committee members have been selected according to how well their talents suit a specific task, and the specialization and narrow focus of their purposes means that committees can usually accomplish a great deal in less time than it would take if the task were assigned to the entire organization.”

Committees should be smaller, more flexible and more focused than the larger organization. The committee chair may wish to record minutes – or you may appoint a secretary – but doing so may not always be necessary.

Most groups will benefit from forming these committees: a budgetary committee, typically chaired by your treasurer; a nominating committee, which assesses people for potential leadership roles; and a membership committee, which bolsters your membership numbers. Create additional standing committees that address your organization’s particular needs.

Meetings which lack an effective chairperson can become chaotic.

As the chair, you must remain impartial to eliminate bias. Keep discussions focused, and ensure all members have opportunities to share their views. Refrain from inserting your opinion into the discussion, except when casting your ballot or breaking a tie.

“Without an effective chairperson meetings can easily fall off track, and what was a regimented and productive meeting can descend into a bout of gainsaying.”

Understand parliamentary procedure, so you can help members with the wording of their motions. Avoid these common mistakes:

- **Using imprecise language** – Be succinct and clear. For example, while people might say things such as “so moved” on television, in real life, the chair should restate what motion a member has put forward.
- **Mistaking questions as motions** – People who shout “question” repeatedly during motions are disorderly and not making new motions.

- **Allowing motions that should be “out of order”** – Don’t let people make motions that encourage illegal activity, represent an action the group already rejected or push for something outside the scope of your bylaws.

Prevent people from burning out or dominating meetings.

Robert’s Rules help you ensure all participants have a chance to share their ideas. This framework provides opportunities for quieter or introverted people to share ideas, and protects minority voices within your group. People often say that 80% of a group does just 20% of the necessary work. Leverage Robert’s Rules to ensure people have an opportunity to take on greater responsibilities, that no one faces burnout from taking on too much and that no one personality dominates the group.

“Robert’s Rules protect the voices of minorities and ensure that even those who don’t actively participate in the group always have an open door.”

Consider designating a parliamentarian to help you broaden your group’s application of Robert’s Rules. You may also benefit from attending community education programs that offer guidance about parliamentary procedure or Robert’s Rules.

About the Author

ClydeBank Business is a multi-media publishing company providing accessible, beginner-friendly texts to global customers.