

LEARNING MADE EASY



3rd Edition

Robert's Rules

for
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Keep meetings organized,
efficient, and on track

Apply the rules of
parliamentary procedure

Adopt effective election
procedures

C. Alan Jennings, PRP

Professional Registered Parliamentarian



Robert's Rules

for
dummies[®]
A Wiley Brand

3rd edition

by **C. Alan Jennings, P.R.P**

for
dummies[®]
A Wiley Brand

Robert's Rules For Dummies,® 3rd Edition

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Introduction

Welcome to the updated version of the second edition of *Robert's Rules For Dummies* — a book with “Robert’s Rules” in the title that doesn’t pretend to be a substitute for Robert’s Rules! It’s written to serve as your personal guide to the principles of parliamentary procedure found in *Robert’s Rules of Order Newly Revised*, (11th edition).

Just so you know, in this book, whenever I use the term “Robert’s Rules,” I’m referring to the current edition of *Robert’s Rules of Order Newly Revised*, not to one of the many other books with “Robert’s Rules” in the title. The “current edition” of Robert’s Rules is the 11th edition. It contains at least 120 changes of some sort from the 10th edition. And that is the big reason why I’ve updated *Robert’s Rules For Dummies*: for you to be able to put two-and-two together with the latest, greatest, Robert’s Rules.

I doubt that you *really* want to know anything about parliamentary procedure. But I’m pretty sure you’re looking to get some quick information to help you participate more effectively in meetings, to serve in an office to which you’ve recently been elected, or both. Whatever your situation, if using parliamentary procedure is a must, then this book will go a long way toward helping you master the rules of Robert’s Rules.

I was in a similar situation back in 1989 when I joined a local unit of the National Association of Parliamentarians in Baton Rouge, Louisiana. I didn’t join because I wanted to be a parliamentarian or because I wanted to be a member of another organization; I joined because I wanted to learn enough to get a new organization off the ground. I needed some specific information, and I didn’t even realize that everything I needed to know but didn’t even know enough to ask about could be found in a book titled *Robert’s Rules of Order Newly Revised* (at that time, it was in its eighth edition, but the ninth edition was about to be published).

At first glance, the real Robert’s Rules appeared to be naught but a tome of arcane spells to intimidate the masses and empower the erudite. But thanks to several very knowledgeable and experienced parliamentarians, I found that quite the opposite was true. Robert’s Rules is actually a great reference book that provides a proper procedure for practically any parliamentary predicament.

So, when I was offered the opportunity to write this book, I thought it would be nice to pay forward all the personal help I've received over the years from the parliamentarians in the Louisiana Association of Parliamentarians, the National Association of Parliamentarians, and the American Institute of Parliamentarians. If I've accomplished my goals for this book, then you can keep *Robert's Rules For Dummies* handy and use it as if it were your own personal consulting parliamentarian.

But it comes with a very important caveat: When you need to make a point in a meeting, be prepared to cite the real Robert's Rules. That is, *Robert's Rules of Order Newly Revised* (11th edition) Whatever you do, please don't go waving *my* book around to your presiding officer unless your bylaws say that your parliamentary authority is Jennings's *Robert's Rules For Dummies* (which they should not!). Of course, I'm delighted that you've bought this book, but it's not a parliamentary authority. It's a book *about* one.

About This Book

To get the most out of this edition of *Robert's Rules For Dummies*, use it to introduce yourself to the fundamental concepts that are covered in comprehensive detail in *Robert's Rules of Order Newly Revised*.

Don't try to read this book cover to cover. Instead, dive right into the chapter containing the information you need. Read it and you'll have a good and thorough overview of that particular topic. If I've done my job, you'll be well oriented to the subject matter. When you turn to the corresponding pages in the 2011 edition of *Robert's Rules of Order Newly Revised*, the in-depth treatment of a particular subject will make much more sense to you, and you'll be able to apply it to your particular situation.

(Not So) Foolish Assumptions

Because you picked up this book, I assume a few things about you:

- » You've heard of Robert's Rules, but you have little (or no) formal training or study in parliamentary procedure.
- » You're a member of an organization that uses Robert's Rules.

- » You want to participate effectively in meetings.
- » Much of what you know about parliamentary procedure is what you've picked up here and there in meetings.
- » You may sometimes feel not confident about how to participate effectively at some point in a meeting, so you keep your mouth shut and later wonder what maybe you could have done if only you had known what to do and how to do it when it could count.
- » You have to deal with others who attempt to minimize the importance of using proper procedures in meetings.
- » You want to have a better understanding of Robert's Rules so that others can't take advantage of you in meetings.
- » If you're an officer or director, you want to understand the proper way to handle your duties in the organization.

I also assume that you won't try to use this book as a substitute for Robert's Rules. It's *not* written to be a parliamentary authority. It's written to give you the perspective you need to make the best use of the real Robert's Rules when you need it.

That being the case, my final assumption is that you will obtain a copy of the real Robert's Rules. The right book is the 11th edition of *Robert's Rules of Order Newly Revised*. Get a copy if you don't already have one. You can order it from my online bookstore at www.alanjennings.com.

Icons Used in This Book

Icons are these peculiar little pictures that surface in the margin from time to time in each chapter to let you know that the following topic is special in some way. *Robert's Rules For Dummies* utilizes the following five icons:



TIP

When you see the Tip icon, you know you're about to read a helpful hint or tip that can save you some time or trouble. The tip may make things easier for you when you're in the thick of some difficult parliamentary situation.



WARNING

When you see this icon, pay close attention. It lets you know that trouble, problems, or exceptions may be lurking, but you can avoid the trouble by taking the right precautions or paying heed to some advice born of experience in the school of hard knocks.



TECHNICAL
STUFF

This one doesn't get a lot of use here, because just about everything in this book qualifies as technical stuff. So if you see this icon, it's sure to be the most technical of the technical stuff.



REMEMBER

I use this icon a good bit, but that's only because there's a lot to remember in this book. But the good news is that you don't have to memorize it because you can flip to the page and go straight for the icon. But generally, this icon highlights key points of whatever discussion you're reading. I also use this icon to point out an important exception to an otherwise pretty hard-and-fast rule.

Beyond the Book

If you need more help with Robert's Rules, I encourage you to check out additional resources available to you online:

- » To view this book's Cheat Sheet, simply go to www.dummies.com and search for "Robert's Rules For Dummies Cheat Sheet" in the Search box.
- » I also include helpful forms and sample documents on Dummies.com. All you have to do is point your browser to www.dummies.com/go/robertsrulesfd3e, download the files you want, and they'll show up on your computer ready for you to customize, save, and print.

Where to Go from Here

Get with it! You bought this book for a reason, so look up whatever it is you need to understand about Robert's Rules. After you've read the discussion, turn to your copy of *Robert's Rules of Order Newly Revised* if you want or need to know more. Immerse yourself in an in-depth treatment of a topic as written by the somewhat droll but definitely learned authors. On my website at www.alanjennings.com, you'll find a link to a great collection of parliamentary procedure titles that you can order direct.

Don't stop there! It's the very nature of parliamentary law that knowledge about one topic leads to interest in another. Learning a little more will make you that much more effective in your meetings and service

as a leader. It feels good to gain a stronger grasp of the Robert's Rules principles.

If I can help at any time, let me know. I can be reached by e-mail through the contact page on my website. Point your browser to www.alanjennings.com, click on "Contact," and type in a message. I make every effort to respond to all my e-mail, so please drop me a line if there's something you need clarified or expanded.

Parliamentary procedure education in your area

If you really want to learn as much as you can, check with one or both of the following organizations and ask for information about the nearest local unit or chapter of parliamentarians. These local units have regular program meetings and offer educational programs in the community. They also usually have registered or professional members that can tailor-make a workshop for your group to help you have better meetings or develop leadership skills.

The National Association of Parliamentarians

213 South Main St.

Independence, MO 64050-3850

Phone: 888-627-2929

Web site: www.parliamentarians.org

American Institute of Parliamentarians

550M Ritchie Hwy, #271

Severna Park, MD 21146

Phone: 888-664-0428

Web site: www.aipparl.org

Hiring a professional parliamentarian

More and more groups are looking to professional parliamentarians for training, consulting, or on-site meeting services.

If you have a large group and would like to have more orderly and productive meetings, or if your staff is overwhelmed when putting together your meetings and could use some help, you will probably

benefit greatly by retaining a professional parliamentarian for specific services.

And even if your group is small and local and is just interested in fixing some bylaws, you save a lot of time and angst if you enlist the help of a local certified, registered, or professional parliamentarian.

No matter the size of your organization, when you find yourself in a rough situation and you just can't get past a particular issue, you may be able to break the impasse by asking a professional parliamentarian to give you a consultation and advise you on how to proceed.

1

**It's
Parliamentary,
My Dear:
Participating
Effectively in
Meetings**

IN THIS PART . . .

Discover the rules of parliamentary procedure

Get familiar with the bylaws of any organization you belong to

Understand the basic requirements for a valid meeting

Follow the standard order of business

IN THIS CHAPTER

Uncovering the source of Robert's Rules

Defining parliamentary law

Understanding the rules of parliamentary procedure

Recognizing the personal benefits of learning Robert's Rules

Chapter 1

Following the Rules (Robert's, That Is)

Are you the kind of person who sees meetings as a wonderful and personally fulfilling activity that you look forward to with great anticipation?

I didn't think so. If you were, you probably wouldn't be reading this book. Truth is, I haven't met many folks who love meetings and can't wait for the next one. But I *have* met plenty of people who dread meetings and attend only because they're afraid of what may happen if they're absent. Attitudes like this develop most frequently when nobody in the group (especially the presiding officer) really knows how to run a good meeting.

Luckily for you, I've found a remedy for anti-meeting attitudes. Try out a well-run meeting conducted by a presiding officer who takes the time to learn and use the principles of parliamentary procedure in Robert's Rules. It really does work wonders!

Keeping Things Informal

For anyone reading this book who thinks that Robert's Rules is all about being stiff and formal in meetings, I hope you disregard that notion right away. Robert's Rules is about conducting good meetings without any more formality than is absolutely necessary to protect the rights of everyone and keep things orderly. The rules are there to help, not hinder, business. General Robert (though not a general at the time) said, in advising inexperienced chairmen in his original edition:

Know all about parliamentary law, but do not try to show off your knowledge. Never be technical, nor be any more strict than is absolutely necessary for the good of the meeting. Use your judgment; the assembly may be of such a nature, through its ignorance of parliamentary usages and peaceable disposition, that a strict enforcement of the rules, instead of assisting, would greatly hinder business; but in large assemblies where there is much work to be done, and especially where there is liability to trouble, the only safe course is to require a strict observance of the rules.

The general's point must be taken to heart. Sprinkled throughout Robert's Rules are details of procedures that are available when you need them. The key theme of *Robert's Rules For Dummies*, as with Robert's Rules in general, is that you don't need to be any more formal than necessary. But you never want to be so informal that you compromise any rights — whether those of the individual, the minority, or the group as a whole.

Making Meetings Meaningful

One of the most marvelous points about Robert's Rules is that it makes meetings meaningful. I first experienced a true understanding of how Robert's Rules can really work to a group's advantage in a meeting of my state association of parliamentarians many years ago.

At that meeting, the president of the National Association of Parliamentarians, Kathryn Scheld, presented a workshop titled "Making Meetings Meaningful." I was really taken with that presentation, and I have since made it my goal in service as a parliamentarian to help my clients see their meetings as events that can and should be meaningful

experiences for the members who invest their time and money in attending and participating. Those three words — *making meetings meaningful* — so clearly describe the most immediate benefit to learning and applying the principles of parliamentary procedure contained in Robert's Rules.

Using *Robert's Rules For Dummies* as a handbook for making your meetings meaningful can give you a real edge on the knowledge that can help you put your organization on the fast track to greater success.

A Brief History of Robert's Rules

Robert's Rules is practically synonymous with *parliamentary procedure*. My colleagues conservatively estimate that more than 80 percent of all organizations use Robert's Rules as their parliamentary manual. But *Robert's Rules of Order Newly Revised* is just one of a number of parliamentary manuals. And because copyrights expire and the name *Robert's Rules* has assumed a generic usage, many books are published with *Robert's Rules* in their titles. But they're not the real thing.

Robert's Rules of Order was the cover title of a book first written in 1876 by Henry Martyn Robert. The actual title was *Pocket Manual of Rules of Order for Deliberative Assemblies*. The author was a civil engineer in the U.S. Army. In 1863, when he was 26 years old, he had been called on to preside at a church meeting. He was reluctant to decline, but he didn't know how to properly preside. Despite his reservations, he accepted the duty, hoping that his lack of knowledge wouldn't be an embarrassment to himself or a disservice to those at the meeting.

We don't know exactly what happened at that meeting that historians describe as "turbulent," but we do know that Robert came away determined to learn something about parliamentary procedure before he even *attended* another meeting.

Some years later, Robert, who at the time held the rank of major, was stationed in San Francisco and found himself working with different organizations having memberships composed of persons from all over the country. Thanks to different local customs, wide disagreement arose over "correct" meeting procedures. Major Robert saw the need for uniformity and immersed himself in study of the parliamentary law of the day. He developed a pocket manual of parliamentary procedure that was published in 1876, known as *Robert's Rules of Order*. Since then, the manual has seen two revisions in a total of 11 editions.

THE EDITIONS OF ROBERT'S RULES

"Robert's Rules of Order" refers to the most current edition of the parliamentary authority described by any of the following titles:

- *Robert's Rules of Order* (RO) (1st, 2nd, and 3rd editions)
- *Robert's Rules of Order Revised* (ROR) (4th, 5th, and 6th editions)
- *Robert's Rules of Order Newly Revised* (RONR) (7th, 8th, 9th, 10th, and 11th editions)

All the revised editions are revisions by the original copyright holder or his successor trustees of the copyrights. The original *Robert's Rules of Order* is out of copyright and, consequently, has been republished or rewritten by numerous authors and sold with the name *Robert's Rules* or *Robert's Rules of Order* in the title.

This updated second edition of *Robert's Rules For Dummies* is intended as your guide to the current (11th) edition of the work, which is now titled *Robert's Rules of Order Newly Revised*. It's based on the most current rules, not on the old and outdated rules of earlier editions.

General Robert's heirs continue to be actively involved in the current edition. The Robert's Rules Association, the National Association of Parliamentarians, and the American Institute of Parliamentarians recognize *Robert's Rules of Order Newly Revised* (RONR) as the authoritative work on parliamentary procedure whenever "Robert's Rules" is designated as the parliamentary authority.

Being Empowered at Meetings

In groups where a presiding officer becomes truly knowledgeable about correct parliamentary procedure, things change for the better. When I hear someone complain about how "parliamentary procedure" causes problems, I'm hearing from a member of a group that uses parliamentary procedure incorrectly. The parts that members dislike about the so-called process aren't even accurate parliamentary procedures. The procedures they're using are usually just somebody's self-serving double-talk