

Mastering Council Meetings

A guidebook for elected officials and local governments

SAMPLE CHAPTER

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Preface

In our society, managing discussion and public comment can be a challenge for leaders of elected governing bodies and citizen advisory groups. This book offers principles, rules and insights that create the conditions for efficient, fair and productive discussion, effective decision-making and orderly public comment at council meetings. All content is based on *Robert's Rules of Order Newly Revised, 11th edition*, also referred to as “Robert.” (See Appendix A for information about all the books we refer to in this work.)

Of course, information is only useful when applied in practice. Running a meeting of a public body is a learned performance skill. It requires certain habits and turns of phrase which do not come naturally. Anyone planning to run such a meeting should accept the fact that “mistakes will be made” and resolve not to mind it. With time and practice, the presider will get better, as will the meetings.

Members of councils as well as mayors, chairs and presidents will benefit from learning this content and bringing it to their meetings.

For the sake of simplicity, the word “council” as used in this book also refers to boards, commissions, committees, or any public governing body or citizen advisory group.

*Failure is not fatal. It is
the courage to continue
that counts.*

Winston Churchill



About This Book

This book is intended both to be instructional and to serve as a resource. We encourage you to read it through with highlighter and sticky notes at hand. We hope that you will return to it again and again.

You may note that occasionally the same point is made more than once—this is deliberate. We want to ensure that the reader has easy access to key information in tough situations as the need arises.

We also sometimes refer to the rules for private organizations in order to put the requirements for meetings of elected officials and public bodies into the broader context of parliamentary procedure.

While we make occasional reference to laws and regulations, please note that we are not attorneys. The purpose of this book is solely to provide general education and information about council and public meetings. The reader is advised to seek a qualified professional for guidance in specific situations.

ACCORDING TO ROBERT

Throughout this book quotes are given from Robert's Rules of Order Newly Revised, 11th edition. These quotes are in this format preceded by the heading "According to Robert" and ending with a page number.

IN OUR EXPERIENCE

We also offer up anecdotes drawn from our personal adventures with nonprofit boards, meetings and Robert's Rules of Order. These anecdotes are intentional diversions from the topic at hand, alleviating the tedium inherent in material of this kind. —Andrew



About the Authors

The authors of this book are business colleagues in Seattle, Washington, who met through their involvement in managing professional associations. A few words from each:

Ann Macfarlane

I began my career as a diplomat with the U.S. Foreign Service serving in Lahore, Pakistan. Later I became a Russian-to-English translator and was elected president of the American Translators Association. Wanting to do a good job at running our board meetings, I took up *Robert's Rules of Order Newly Revised*, but found the book to be impenetrable, confusing and boring—it's more than 800 pages long!

I would have given up, but our bylaws, like the bylaws of 90% of the voluntary associations in this country, said, "Meetings shall be run according to *Robert's Rules of Order Newly Revised*, latest edition." I kept on reading and studying, and eventually realized that there is a core to Robert's Rules that is vital to fair and effective meetings, wrapped in a lot of verbiage and complexity that is not essential.

From that beginning I developed Jurassic Parliament as a way of cutting through the confusion of procedure and jargon, making the core principles of Robert's Rules available to everyone. I used my experience as a diplomat and a translator to find ways to extract the essence of this method of meeting management and decision-making. In this book Andrew and I offer our readers what we consider to be the best of Robert's Rules—a commonsense and down-to-earth approach. We've seen amazing results when this method is applied, in many differing types of organizations. (See our website, www.jurassicparliament.com, and search for "Success Stories" to learn more.) We can help you turn painful meetings into productive, pleasant and effective events that get the work of your organization done.



Andrew Estep

Like many in my generation who felt lost out of high school and at a loss about college, I enlisted in the U.S. Air Force. There I learned many of life's lessons that continue to serve me well: the value of service to my country and my fellow, the importance of good organization to accomplishing goals and how communication is the key to all effective human interaction.

With the end of the Cold War, my career in aerospace ended and I was drawn to nonprofit work. A short stint in health care led me to work in association management as the executive director of a regional organization. There a group of patient and compassionate association executives, my colleagues at the time, showed me the value of the human factor. I learned it is not enough to have efficient and effective systems; one must also account for and celebrate the diversity and strength that people bring to these systems.

In 2001, I bought an association management company, put everything I had learned to use and discovered it was not enough. I also had to learn the value of compromise and collaboration, and how to maintain many different systems in varied milieu. In other words, I learned to juggle.

Thankfully, I met my friend and colleague, Ann Macfarlane, in 2004. In 2007 we became business partners and began working together on Jurassic Parliament. Ann taught me the value of Robert's Rules of Order and proper parliamentary procedure. Since then we have refined our training and information services to better serve our greater community.

Mastering Council Meetings is a distillation of our work together. We believe that as you implement the systems and methods outlined here your city or county council will be transformed. We challenge you to conduct your meetings "According to Robert."



Why the Dinosaurs?

People often ask how the dinosaurs became a part of Jurassic Parliament. It all goes back to 1999 when, as Ann described, she was newly elected as president of the American Translators Association. She struggled with Robert but gradually began to get a sense of how the system worked. She wanted to share it with her colleagues on the board of directors, but wasn't sure how to do that without boring them silly.

One concept that came to her was the realization that a “motion” is not just words, it is a thing. Once a group has made a main motion and started discussing it, they have to dispose of it in some way—to adopt it, defeat it, send it off to a committee—but they can't just abandon it. She was mulling over how to get this idea across when her eye fell on some Jurassic Park dinosaurs belonging to her 9-year-old son, Steve. The movie was very popular at that time, and the house had lots of those critters underfoot.

Ann picked up a T-rex and thought, “This could be the main motion—it certainly is a definite ‘thing’—and then we could use the dimetrodon for the amendment, another ‘thing,’ and show that the dimetrodon blocks the forward progress of the T-rex. You have to vote on the amendment before the main motion can move ahead...and a ‘point of order’ could be a flying dinosaur that soars over the heads of the other motions...”

From that moment she developed the whole system for showing how motions work in the city of Dinopolis, which has given a lot of pleasure in teaching a subject that can be perceived as dull. She owes it all to Steven Spielberg and her son Steve.

Introduction





Introduction

Our democratic culture, and this book, assumes that all group members have equal rights and an equal voice. We also assume that these rights change when an individual assumes a specific role within a group. It is important to have a clear understanding of how these rights change and why.

The achievements of an organization are the results of the combined effort of each individual.

Vince Lombardi

Two Types of Organization

In learning to master meetings of public bodies, it is vital to understand the difference between two types of organizations.

An “accountability hierarchy” is shaped like a pyramid or triangle. The person at the top is “the boss.” This person selects people to do the work of the organization, directs them in their task, gives them feedback and, if they do not perform adequately, fires them. We are all very familiar with this structure, since it occurs in virtually every business corporation, in the military and in many other human institutions.

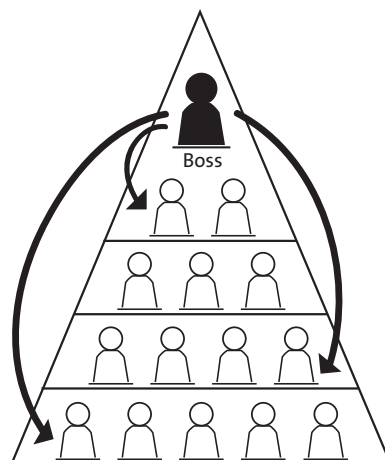


Figure 1. Accountability Hierarchy



A “voluntary association” has an entirely different structure. This type of organization is shaped like a circle. A group of people come together to achieve a common purpose, set up some rules for themselves and choose a leader. All the members have equal standing and, in general, one vote. The leader’s role here is very different—she must convince the members by persuasion, not direct them by giving orders. She is a facilitator, not “the boss.”

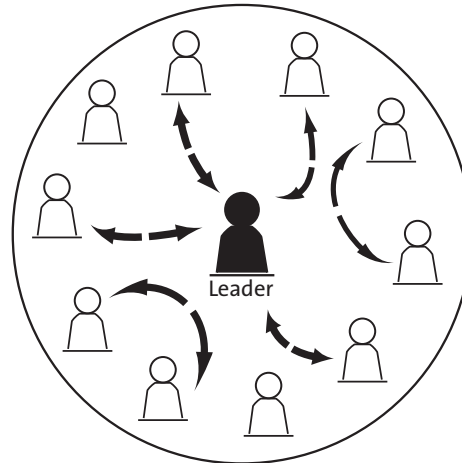


Figure 2. Voluntary Association

A city council is a voluntary association whose members are elected by the people. Robert’s Rules of Order were created for just such voluntary associations.



Nature of a Governing Board

The Standard Code of Parliamentary Procedure, another significant authority on meetings, makes the following important point about the nature of a governing board:

All members of a governing board share in a joint and collective authority which exists and can be exercised only when the group is in session.

This is why meeting procedure is so critical—a group must make the most of the time it spends together, because that is when its authority can be exercised.

Who's in charge?

It is important to know the source of the authority by which a body makes decisions. A city council or municipal governing board is subject to the laws of the state in which it is established, and to any federal laws that apply. A board, commission or committee is subject to the city council (or other body) that appoints it, and to the ordinances and regulations of the jurisdiction in which it is established.

Even if a state does not give explicit authority to city councils or your body to create such rules, the courts have found that governmental bodies are subject to “common parliamentary law.” In other words, people cannot just do what they like—they must observe common standards of fair process and behavior. Robert's Rules of Order is accepted by many as the definitive statement of common parliamentary law.



Levels of authority

It is helpful to visualize the different sources of authority for the actions of a city council or other body in a hierarchy like the one below. Each lower level of this ranking must conform with the requirements of the higher levels. For example, if state law prohibits a mayor from voting whenever money is involved, the council rules of procedure cannot allow the mayor to cast a vote about the budget.

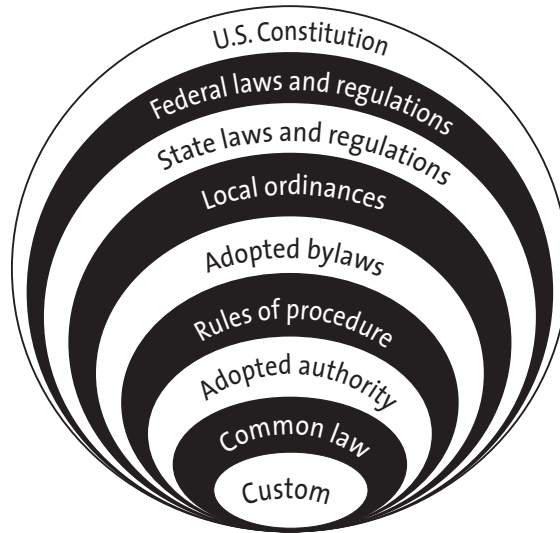


Figure 3. Levels of Authority

1. U.S. Constitution
2. Federal laws and regulations (if any)
3. State laws and regulations
4. Local ordinances (if any)
5. Bylaws adopted by body (if any)
6. Rules of procedure adopted by body (if any)
7. Adopted parliamentary authority if any (Robert's Rules, The Standard Code, or others)
8. Common parliamentary law
9. Custom



Should our council adopt Robert's Rules of Order?

Some councils have adopted, by resolution or ordinance, a set of meeting guidelines, and others have not. Many of these guidelines include reference to Robert's Rules of Order, using such language as "meetings shall be governed by Robert's Rules of Order and these council rules of procedure. In case of a conflict, the council rules of procedure shall prevail."

It has at times been suggested that Robert's Rules is too complicated for small cities and towns, and they would do better not to adopt it. The book is complicated, but it still provides the best and most useful set of rules of order for civic bodies—provided that folks are willing to do a little work and learn how to use Robert's Rules properly.

The use of written motions and amendments provides an efficient and fair way to consider proposals and modify them in accord with the group's preferences. The method is a little unusual, in that amendments are taken up before the motion is voted on, but once groups get used to it, the system works well.

The rule that no one may speak a second time until everyone who wishes to do so has spoken once is vital to equalizing power imbalances and giving everyone a fair shake in discussion. It should be observed by all groups, whether or not they have formally adopted Robert's Rules.

Robert's Rules provides "special rules for small boards" that can be useful for councils, should they choose to apply them. It also allows groups to develop and apply their own "special rules of order," so if a body wishes to change something, it is perfectly free to do so. These rules may also be called "standing rules."

In sticky situations, "do-it-yourself" rulemaking can lead to ad hoc invention of rules by the mayor or council president. A presider who makes up rules or improvises on the basis of vague memories from student government days is a sure path to problems, especially if the rule-maker has an air of authority.

While councils often rely on their attorney for advice in this arena, few attorneys have had serious training in parliamentary procedure and few correct the common and widespread misunderstandings about Robert's Rules.

A body cannot do its work without some procedural guidelines. Failing to adopt Robert's Rules does not mean that there are no guidelines—but without a specific "parliamentary authority" in times of conflict, a group will be driven back to rely on "common parliamentary law."



Finding out what “common parliamentary law” requires and how it applies to a given situation is likely to be complicated and expensive, requiring time and attention from legal counsel and qualified parliamentary consultants. Far better to have set the terms of discourse in advance, so that everyone knows and agrees to the way they will consider matters.

IN OUR EXPERIENCE

Avoid the imposters! By “Robert’s Rules” we mean Robert’s Rules of Order Newly Revised, 11th edition. Other books purport to be as good as Robert, but none have the depth and authority of the original Robert. Also, all out-of-date editions should be tossed in the recycling bin, not used. —Andrew

Adopting a set of commonsense guidelines based on Robert’s Rules, incorporating it by reference for the more unusual or complicated situations that may arise, and then committing to the education necessary to get everyone on the same page, will pay big dividends for every council willing to make the effort.

We recommend that every city council and government provide a copy of *Robert’s Rules of Order Newly Revised in Brief* to each council member. This little book is a splendid summary of the rules applicable to all but the most exceptional situations. It is value-priced, and it can be read in an evening.

Note, however, that *Robert’s Rules of Order Newly Revised in Brief* may not be adopted as an authority in its own right. It functions as a signpost to the “big book,” *Robert’s Rules of Order Newly Revised, 11th edition*. We believe that mayors, presidents, clerks, secretaries and anyone wishing to delve more deeply will find it beneficial to purchase this book. Having the authoritative Robert at one’s fingertips is essential for good process, and for personal confidence. The spiral-bound version offered by the National Association of Parliamentarians is easy to work with and annotate because it lies flat on the table.

————— Part I —————

Fundamentals





Part I: Fundamentals

As in all things, a clear and common understanding of the fundamentals can dramatically impact effectiveness. For council meetings, these fundamentals include the role and function of the presider, the nature and types of meetings, and voting's permutations. In Part I we explain:

- The role of the presider;
- The components and types of meetings;
- How agendas and minutes function; and
- The basics of voting.

Presiding

When running a meeting, the presider is both the most important person in the room and the least important person in the room. The ability to keep things in hand while maintaining this paradox is crucial to successful meetings.

Different people with different personalities will display different styles, but there are certain habits that make for a more effective presider. These additional steps will help in developing a strong presiding style:

A presider should always use the pronoun “our” rather than the pronoun “my” in referring to the council, its activities or its members. Always say, “I’ll ask our city clerk” rather than “I’ll ask my clerk.” To use the pronoun “my” and “mine” means that you are reducing people, organizations and entities to a part of yourself. The staff, the resources and the city belong to everyone, not to the mayor or the presider.

*A leader is best when
people barely know he
exists, when his work is
done, his aim fulfilled,
they will say: we did it
ourselves.*

Lao Tzu



*Effective listening
is a professional
achievement—achieved
only through hard work.*

Tom Peters

Cultivate an attitude that is warm, calm and in control. Connect with people as a colleague and a fellow human, while maintaining the authority of the position.

Formality is a friend. Use titles rather than first names. Do not try to be chummy.

Ideally, no one should be able to tell whom the chair likes or dislikes. Strive to treat everyone with fairness, no matter your personal feelings.

Cultivate the ability to observe yourself with “the third eye,” to step back and notice when your voice becomes shrill, your temper rises or you are in danger of losing your cool. Know your own weaknesses and take steps to counterbalance them.

When another person is speaking, listen to her as if there were no one else in the room. The undivided attention of the presider will assure each person that their concerns are taken seriously and that they are respected. (Council members should do this too.)

Take the time to memorize the language of the presider so that you can speak with confidence, and control the ebb and flow of meeting discussion. See “Addressing Disorder” on page 101 for specific examples.

Do not be afraid to admit ignorance or confusion. When in doubt, propose a course of action to the group and let the group decide.

Above all else, remain the servant of the group. The presider’s job is to help the group make up its mind. As long as you keep to this role, you will be fulfilling your duty.

Duties

Newly elected mayors are sometimes expected to start running their meetings with little or no training in meeting procedure. Instead, it is assumed that they have “picked it up” as they attended earlier meetings of the group. While experience teaches much, a little study can make a large difference and produce far better meetings.

A mayor, as meeting presider, is given these duties by parliamentary law. Keep the following list, taken from Robert (pp. 449-450), handy. It is important to know what these responsibilities are, and what they are not. Above all, the presider serves the group and assists it to make its own decisions. The mayor is the facilitator, not the dictator.



It is the presider's job to:

Duty	Description of duty
Open meeting	To open the meeting at the appointed time by taking the chair and calling the meeting to order, having ascertained that a quorum is present.
Announce next activity	To announce in proper sequence the next activity before the assembly in accordance with the prescribed order of business, agenda or program.
Recognize members	To recognize members who are entitled to the floor.
State questions and put to vote	To state and to put to vote all questions that legitimately come before the assembly as motions or that otherwise arise in the course of proceedings, and to announce the result of each vote; or, if a motion that is not in order is made, to rule it out of order.
Refuse to recognize dilatory motions	To protect the assembly from obviously dilatory (time-wasting) motions by refusing to recognize them.
Enforce order and decorum	To enforce the rules relating to debate and those relating to order and decorum within the assembly.
Expedite business	To expedite business in every way compatible with the rights of members.
Decide all questions of order	To decide all questions of order subject to appeal—unless, when in doubt, the presiding officer prefers initially to submit such a question to the assembly for decision.
Respond to inquiries	To respond to inquiries of members relating to parliamentary procedure or factual information bearing on the business of the assembly.
Authenticate documents	To authenticate by his or her signature, when necessary, all acts, orders and proceedings of the assembly.
Close meeting	To declare the meeting adjourned when the assembly so votes or—where applicable—at the time prescribed in the program, or at any time in the event of a sudden emergency affecting the safety of those present.



Amendment (rank 3a)

Tomas: *I move that we amend the motion by adding the words “in the Okaachooku Swamp.”*

To amend a motion means to change a motion or improve it because you’ve come up with a better idea.

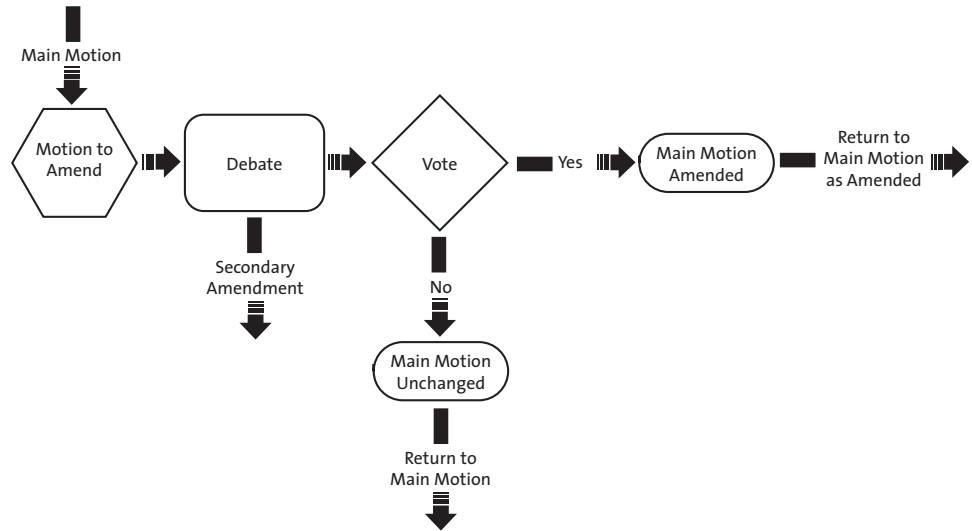


Figure 6. Amendment

Amendments must be germane, which means “related” or “relevant.” If there is a question, the presider decides whether an amendment is germane or not. (If there is a challenge to this decision, however, the group has the final say.)

Amendment:

- needs a second,
- can be debated,
- can be amended, and
- takes a majority vote to pass.



Motions may be amended in several different ways:

- Add or insert words.
- Strike out words.
- Strike out and add or insert words.
- Substitute.

To add words is to place them at the end of the text of the motion; to insert words is to place them within the motion.

Important points about amendments

Amendments are discussed and voted on before the main motion in order to make the main motion as good as it can be (to “perfect” the motion).

Once a motion has been amended, it can be amended again if the proposed amendment applies to another aspect of the motion.

The only limit to the number of amendments is the patience of your group.

Amendments may be made at any time during debate.

It takes special actions to go back and change something already amended.

Amendments cannot negate the original motion, or convert one parliamentary motion into another.

Amendment by substituting has several tricky aspects.