

# PRIMER ON ROBERT'S RULES OF ORDER

Fairfield RTM – February 18, 2020

## OVERVIEW

Robert's Rules of Order is the most widely used manual of "parliamentary procedure" in the United States. Parliamentary procedure itself is the name given to the tradition of rules of conduct and customs grown up in the civilized world to run meetings of a diverse range of organizations – from clubs, church groups, private clubs, homeowner associations and professional societies to boards, unions, commissions, and other political bodies. Parliamentary procedure is a time-tested method of conducting business at meetings and public gatherings and can be adapted to fit the needs of any organization. It allows everyone to be heard and to make decisions without confusion.

The current edition (2011) of *Robert's Rules of Order Newly Revised* is the actual book of rules – or the "parliamentary authority" – that most organizations adopt as the basic tenets for running their meetings. This presentation, which draws heavily from this book, will go over some of the terms and procedures you find in Robert's Rules, and cover the fundamentals that you should know.

## HISTORY of ROBERT'S RULES

Some of Robert's Rules' lineage goes as far back as the ancient Greeks, but its basic content was formed through centuries of trial and error in the English Parliament. The rules are named after Henry M. Robert, a distinguished engineer Brigadier General in the U.S. Army, who was a self-taught, active student on the subject. Robert attended many meetings in his day and wanted to "adapt the rules and practice of Congress to the needs of non-legislative societies." As a Major in 1876, he created *Robert's Rules of Order*, which became the standard authoritative guide on how meetings would be run. It is now the most common form of parliamentary procedure in the United States and is used at meetings of all sizes, including the United Nations.

Robert envisioned the book to be 50 pages in length. By the time he wrote the first edition in 1876, it was 176-pages of text. Over the next 135 years, new rules and procedures were added to cover any issue that could come up, including major revisions in 1915 and 1970, and the manual has grown in size to 669 pages of text in its current and 11th edition published in 2011.

The copyright to *Robert's Rules of Order Newly Revised* is owned by the Robert's Rules Association, has a team to continue the task of revising and updating the book. The 11th and current edition was published in 2011. In addition, in 2005, the Robert's Rules Association published an official concise guide, titled *Robert's Rules of Order Newly Revised In Brief*. A second edition of the brief book was published in 2011.

It is said that at least 80% of the content will be used less than 20% of the time, so it serves as a reference to provide an answer to any question on parliamentary procedure. However, it is not important to know every aspect of the rules to run a meeting properly, but it is crucial to grasp the fundamentals.

## BYLAWS

The Bylaws of any organization are a written document that defines the purpose of a group, its organizational structure, and any specific rules that govern the group. They are usually customized for a specific group, then published and reviewed annually for revisions. **The Fairfield RTM's Rules to Regulate are that body's bylaws.**

Many organizations' bylaws do specify that Robert's Rules of Order is the group's parliamentary authority. **Rule 35 in the RTM's Rules to Regulate state that the latest edition of General Robert's Rules of Order shall govern procedures and protocol of the Meeting.**

**Robert's Rules was designed to:**

- 1) keep business moving
- 2) protect rights of members
- 3) ensure polite behavior in organizations

The key value of the Rules is to help make meetings go smoothly when everyone agrees and allows the group to come to decisions fairly when issues are contested. The Rules "assist an assembly to accomplish in the best possible manner the work for which it was designed".

Robert's Rules are used not only when problems arise, but also should be followed as a matter of course for a meeting to work well. An orderly, well-run meeting is better for the officers and it's better for those attending. You'll get more business done in a shorter time, and everyone will be happier.

The main goals of parliamentary procedure or Robert's Rules are:

- **To conduct business one item at a time.** Jumping around from one item to another can be confusing, and it generally delays progress on any of the items.
- **To ensure motions are in order** and that the rules of debate are obeyed.
- **To have members obtain the floor properly** and that they speak clearly and concisely. This eliminates crosstalk and requires all speakers to address the chairperson. This helps you keep control and ensures everyone will hear the business at hand.
- **To ensure justice and courtesy** for all and partiality to none.
- **Lets committees do their work.** An organization's general meeting is to resolve the major issues. This saves everybody's time by letting committees deal with the smaller details.
- **Limit discussion to the topic at hand.** Keeps things focused and speakers on topic.
- **Cut off discussion when it becomes redundant.** For controversial issues, setting a time limit for each speaker can help. When discussion becomes circular, it is important to summarize the points on each side and ask for only something new – or to shut off discussion by calling for a motion.

**Note: How strictly any organization decides to adhere to Robert's Rules is up to that organization, but if each group followed at least the basics of parliamentary procedure, everybody wins.**

**“Quorum”** is the minimum number of members required to conduct business at a meeting. Usually this number is stated in the group’s bylaws. **For the RTM, which has 40 members, a quorum is 21 members.** If a quorum is not indicated in the bylaws, Robert’s Rules of Order sets it at a majority of members (if 10 members, then 6 is a quorum; if 15 members, then 8 is a quorum). When no quorum is present, the meeting is limited to actions such as setting the time and place for another meeting and discussion of topic. Any substantive action (i.e. a vote) taken in the absence of a quorum is invalid. If members leave during a meeting, therefore bringing attendance below the level of a quorum, it loses its right to conduct substantive business until members return or other members arrive. It can however discuss and debate an issue, just not vote.

**Note: It is always important to tell the Clerk if you just arrived or are leaving a meeting so he/she can keep count of the members present.**

**RTM EX-Officio Membership:** In addition to 40 members of the RTM, ex-officio members are shown below but they do not count towards the quorum. Ex-officio members can make motions or second motions, but they cannot second motions made by other Ex-officio members and they cannot vote.

- Members of the Board of Selectman
- Members of the Board of Finance
- Chairman of the Board of Education
- Town Attorney and Assistant Town Attorney
- Town Clerk

## **AGENDA**

The agenda is a detailed list of specific items that will be discussed at a meeting, provided in the sequence in which they will be covered. It is generally wrong to assume that the President or Chair “sets the agenda”. It is common for the President to prepare a proposed agenda, but that becomes binding only if it is adopted by the full assembly by majority vote.

A typical order of business for a regular meeting might be:

1. Welcome
2. Treasurer’s report
3. Principal’s report
4. Roll Call
5. Pledge of Allegiance/Moment of Silence
6. Reading and Approval of Minutes
7. Reports of Officers, Boards, and Standing Committees
8. President’s report
9. Committee reports
10. Unfinished business – items carried over from last meeting
11. New business – need a majority vote\* (see below)
12. Announcements (including date and time of the next meeting)
13. Adjournment

**The RTM's Rules to Regulate** more or less dictate the agenda under Rule 16, which gives the order of business and instructs the Town Clerk to put appointments on first, followed by other resolutions in the chronological order they were received by the Clerk's office.

Most resolutions are provided to the Town Clerk by the BOS, BOF, and other bodies under the normal course of business – noted in the paragraph below. Also, two members may introduce a resolution. This RTM-initiated Resolution shall be made in writing by a Meeting member, including ex-officio members, signed by the sponsor and seconded by a non-ex-officio member.

According to Rule 8, items for the agenda are to be submitted to the Town Clerk's office 14 days before the meeting, and then the Moderator makes the committee assignments. The Warning shall be sent by mail at least five days before the meeting and a copy of such notice shall be published in a newspaper having circulation in the Town. Committees to which each item is referred shall be included, along with the sponsors of each resolution, ordinance or other item (except honorary resolutions).

**The Regular order of business for an RTM meeting (Rule no. 16 in Rules to Reg.):**

1. Roll Call
2. Pledge of Allegiance/Moment of Silence
3. Approval of Minutes of the previous meeting
4. Honorary Resolutions
5. Consent Calendar (Rule No. 22)
6. Business on the Warning
7. Old Business
8. Committee Reports (not related to the Warning)
9. New Business\*
10. Adjournment

**\*New Business** – with most organizations, unless a specific procedure is stated in the bylaws, an agenda is normally non-binding until it is adopted by a majority vote of the assembly at the beginning of the meeting. Any new item(s) can only be added at the beginning of a meeting when the agenda is being approved and can then be voted on.

So, at the time that an agenda is presented for adoption, it is in order for any member to move to amend the proposed agenda by adding any item that the member desires to add, or by proposing any other change.

**However, the RTM is slightly different in that it has a specific rule (No. 33) that says any matter not on the Warning for a meeting except 1) honorary resolutions and b) matters previously held in committee, may be discussed at such meeting but shall not be acted or voted upon until the resolution stands over one meeting. However, for members to bring up new items (for discussion**

**AND voting) at that meeting under New Business requires a 2/3 vote according to FOI rules. This can happen because a 2/3 vote is the accepted minimum number of votes needed to bypass (or waive) the rules, as noted further below.**

## **MINUTES OF THE MEETING**

The minutes of any meeting are the permanent record of the business conducted during a meeting, typically prepared by the group's secretary. Meeting minutes include details such as the date, time, and location of the meeting, whether a quorum was present, who was at the meeting, and who the presiding officer was. Text of specific motions and their outcomes (but not exact vote counts) are also included in the minutes. Discussion is not documented in the minutes. Essentially, Minutes should generally include only what was *done*, not what was *said*. The minutes for each meeting are presented for the assembly's approval at the next meeting.

## **MOTIONS:**

A motion is a formal way to propose something on which the group should vote to take some specific action. It may decide on anything from taking a position on a major issue to organizing a fundraiser. Motions are voted on by the entire group that is present. An idea at a meeting will often result in the presentation of a motion. The motion is the way to resolve a dispute, debate, disagreement or open issue.

Each motion requires a certain vote for it to pass and **all** Members have the right to vote. Below are the main required votes:

- **Majority of those present** – the usual way to adopt a motion is determined by the vote of the majority of those present (i.e. more than half)
- **Two-thirds** – usually needed when the body needs to suspend the rules or to call the question, or to close, limit, or extend debate....essentially to “change” the normal procedure of business.
- **Majority of the Entire Membership** – only needed when amending something previously adopted or to Rescind an item previously adopted.

**“Abstention”** – this is often a confusing item. It is essentially a refusal to vote. Abstentions are not counted in voting and have absolutely no effect on the outcome of the vote cast. If the vote is a majority of the entire membership of 40 people (vs. just those members present), an abstention has the same effect as a “no” vote. For example, if there are 20 yes votes and 0 no votes and 20 abstentions, the item fails because there needs to be a majority to pass the item (remember ties also mean a motion fails). Use an abstention only if there is a conflict of interest or you truly feel there is not enough information to make an informed decision.

## **Types of Motions:**

There are many motions used under parliamentary procedure, but the four main ones are listed below.

1) **Main Motions and Resolutions:** The purpose of a main motion is to introduce items to the membership for their consideration. They cannot be made when any other motion is on the floor, and yield to privileged, subsidiary, and incidental motions.

2) **Subsidiary Motions:** Assists the proper disposal of the main question. Replaces the main motion to become the immediately pending question. Their purpose is to change or affect how a main motion is handled and is voted on before a main motion. Such motions include:

- To Lay on the Table
- To Call the Previous Question (closes debate)
- Limit or Extend Debate
- Postpone to a Definite Time
- Refer or Commit to a Committee
- Amend the Main Motion or Amend and Amendment
- Postpone Indefinitely

3) **Privileged Motions:** Their purpose is to bring up items that are urgent about special or important matters unrelated to pending business (i.e. adjourn, recess, etc). They have the highest precedence over all other motions except Incidental (see below).

4) **Incidental Motions:** Their purpose is to provide a means of questioning procedure concerning other motions and must be considered before the other motion. Such motions shown below are in order at most times, but only for the motion to which they adhere:

- Point of Order
- Point of Parliamentary Inquiry
- Point of Information
- Appeal from the Decision of the Chair
- Suspend the Rules
- Object to Consideration of a Question
- Division of a Question

### **Subsidiary Motions (in Detail):**

• **Call the Previous Question** (2/3 vote required) – this motion closes further debate on a subject and moves immediately to a vote. It is non-debatable. It is used when there is extended or exhaustive debate or discussion and the body wants to go ahead and vote on the item.

• **Postpone to a Certain Time/Date** (majority vote required) – if the body wishes to put off taking a vote for a particular reason (e.g. it is a matter that is not urgent, or you want to take up something else that is, or you need more information before making a decision), then members can postpone to a certain date or time. However, items cannot be postponed beyond the next regular meeting and not beyond the third month after the present month.

• **Table a Motion** (majority vote required) -- If it is clear that a motion cannot or should not be voted upon at the current time (other business must be taken up that is more important), it is typical to “table” the item until later in the meeting or until the next meeting. However, if a motion is tabled, then it must be “taken from the table” by the end of the next session (commonly, the next meeting) after the one in which it was laid on the table, if that session occurs within a three-month period; otherwise, the motion dies. “Taking from the Table” also requires a majority vote, and is not commonly used.

- **Commit or Refer** (majority vote required) – before voting on a main motion, someone may feel that it would be better to redraft the motion or have it studied further by a small group or committee.
- **Reconsider** (majority vote required) – if a motion has been either adopted or defeated during a meeting, and at least one member who voted on the winning side wants to have the vote reconsidered, such a member may make the motion to “Reconsider”. Can only be made by a member who voted on the winning side, and the motion can only be made on the same day the original vote was taken.
- **Rescind** (2/3 or majority vote required) – any member can make a motion to rescind (reverse) the outcome of a vote. There is no time limit on making such a motion and it requires either a 2/3 vote of members present OR a majority of entire membership, unless intent to make such a motion was given at the previous meeting OR intent of motion was communicated to the secretary prior to the meeting so that written notice was given and such intent can be put in the “call” or “agenda”. Then a majority vote of those present is all that is required. Note: If the motion you wish to Rescind has been **executed in an irreversible manner**, you cannot Rescind it.
- **Amend the Main Motion or Amend an Amendment** (majority vote required) -- An item or a motion itself can be amended if someone wants to insert, strike, or replace words, or paragraphs that make up the item or the motion.
- **Postpone Indefinitely** (majority vote required) – if debate on the main motion has begun and you want to get rid of that motion without a direct vote on it, use this motion. Kills the item for the entire session. But until it is adopted, it leaves the main question open to debate.
- **Limit or Extend Debate** – (2/3 vote required) – pertains to the debate of the issue by the body (not by the member) used as a compromise between the right of the individual to be heard and the right of the group not to be unduly delayed in conducting its business.

#### **Incidental Motions (in Detail):**

- **Point of Order** (no second necessary and no vote taken) – any member may call the attention of the Chair to a violation of the rules by calling out (without being recognized), “Point of Order!” The Chair rules on the point of order, saying, “The Chair rules that the point of order is well taken” or “...not well taken.”
- **Appeal from the Decision of the Chair** (majority vote required) –The body has final say after the Chair makes a ruling on a Point of Order. Without being recognized, a member can say, “I appeal from the decision of the chair,” which is an attempt to reverse the ruling of the Chair. The Chair then addresses his ruling, followed by any members who can address the issue once each, and then back to the Chair for final comment before putting to a vote on the appeal.
- **Point of Parliamentary Inquiry** – if you want to ask a question about the rules and how they apply to what is going on or something you want to do, you can, without recognition, say, “A parliamentary inquiry, please.” The Chair responds but because it is not a ruling, it is not subject to appeal.
- **Point of Information** – a question relevant to the business before the body but not related to parliamentary procedure.

- **Suspend the Rules** (2/3 vote required) – occasions when you wish to do something forbidden by the rules. Not necessary to name the rule, just describe what it is you want to do that would violate the rules.
- **Object to Consideration of a Question** (2/3 vote required, but no second needed) – before debate on an original main motion has begun, you may raise an “Objection to Consideration of the Question”, which can suppress the main question against consideration. If objection is approved, then the item is dead for the session unless unanimous consent brings it back that session. If debate has begun, see *Postpone Indefinitely* above.
- **Division of a Question** (majority vote required, but no second needed) if main motion contains two or more parts that could stand as separate questions, can treat each part individually in succession.

### **MAKING MOTIONS - SPEAKING AT A MEETING**

Any member can present a motion to the group. Once recognized by the Chair, the proposer says, “I move that...” and clearly states what is being considered. Someone else then “seconds” the motion, to show that it is supported by another member. Guided by the Chair, the group discusses and debates the motion until they are ready to vote. **Any motions in the RTM that relate to a resolution should provide that resolution in writing to the Moderator to read to the body.** Finally, the Chair asks for an indication of “all those in favor” followed by “those opposed.” There is no need to ask for “abstentions” (those who choose not to vote at all), because abstentions are not counted toward the outcome of the motion.

#### **Steps to Making a Motion:**

##### **1) Obtaining the floor**

- Wait until the last speaker has finished.
- Rise and address the Moderator by saying, "Mr. Moderator"
- Wait until the Moderator recognizes you. Will always be first to raise hand, as long as he/she has not spoken already and there are others who want to speak.

##### **2) Make Your Motion**

- Speak in a clear and concise manner.
- Always state a motion affirmatively. Say, "I move that we ..." rather than, "I move that we do not ...".
- Avoid personalities and stay on your subject.

##### **3) Wait for Someone to Second Your Motion**

**4) Another member will second your motion or the Moderator will call for a second.**

**5) If there is no second to your motion it is lost.**

##### **6) The Moderator States Your Motion**

- The Moderator will say, "it has been moved and seconded that we ..." Thus placing your motion before the membership for consideration and action.
- The membership then either debates your motion, or may move directly to a vote.
- Once your motion is presented to the membership by the Moderator it becomes "assembly property", and cannot be changed by you without the consent of the members.



## **7) Expanding on Your Motion**

- a. The time for you to speak in favor of your motion is at this point in time, rather than at the time you present it.
- b. The mover is always allowed to speak first.
- c. All comments and debate must be directed to the Moderator.
- d. Amendments – Before vote is taken, motion may be amended by inserting/adding/striking/replacing words or paragraphs.
- e. Keep to the time limit for speaking that has been established.

**Note:** The mover may speak again only after other speakers are finished, unless called upon by the Chairman.

## **8) Putting the Question to the Membership**

- a. If there is no more discussion, a vote is taken.
- b. On a motion to move the previous question may be adapted.

## **9) Moderator announces result – “motion carries” or “motion in lost”**

### **Methods of Voting:**

There are four methods used to vote:

- 1) **By Voice** -- The Chairman asks those in favor to say, "aye", those opposed to say "no". Any member may move for an exact count.
- 2) **By Roll Call** -- Each member answers "yes" or "no" as his name is called. This method is used when a record of each person's vote is required.
- 3) **By General Consent** -- When a motion is not likely to be opposed, the Chairman says, "if there is no objection ..." The membership shows agreement by their silence, however if one member says, "I object," the item must be put to a vote.
- 4) **By Division** -- This is a verification of a voice vote. It does not require a count unless the Chairman so desires. Members raise their hands or stand.

### **HANDLING DEBATE/DISCUSSION OF AN ITEM**

Once an item is seconded, it goes to the floor for debate/discussion. The key rules of debate:

- **Setting speech limits in debate** – Robert’s Rules state that each member can speak for up to 10 minutes twice on each item, unless bylaws state differently or a motion is made to limit time of speaking or number of times someone can speak. This prevents one person from taking an inordinate amount of time to talk. If not in your bylaws, it may be a good idea to establish these limits in the bylaws or establish an acceptable time limit at the beginning of the year or at each meeting, depending on the specific topic(s) to be discussed.

- **Preference/order of debate** – the chairman must always recognize the speaker before that person can talk, as people cannot just blurt out comments or questions at will; such action would be considered out of order (see below). The maker of any motion always has first opportunity to talk during discussion of that item. It is generally accepted that nobody speaks twice until all members gets their first chance to talk. Note: the Chairs of assemblies with more than a dozen members often do not get involved in debate to maintain an appearance of impartiality.

- **Staying germane to the Subject** – absolutely critical for speakers to stay on topic; one of the Chair’s main duties is to keep them on track and reign in anyone who goes off subject by interrupting them and telling them that their comments are not in order. The rule is that all remarks must be germane – they must have bearing on whether the pending motion should be adopted.
- **Debate Issues not personalities** – also very important to never get personal in discussion and that only the merits of the item be discussed, not the person who supports/opposes such item; if personal debates occur, the Chair can call the person out of order and ask them to remain quiet.
- **Closing Debate** – debate ends when discussion/questions/comments are done, or when each member exhausts their time to speak, or a motion is made to move the question (see below). At that time, the chairman puts the question to the body and a vote is taken (see Voting below).

### MAINTAINING ORDER AT A MEETING

Maintaining order at any meeting can oftentimes be the most challenging part of being a Chair. The Chair has the duty of making sure that the rules are followed. In order to preserve this order, any transgression of the rules can force the Chair to call a member “out of order”.

On the flip side, any member may utilize an Incidental Motion (see above) and call the attention of the chair to a violation of the rules, by interrupting and calling out “Point of Order” and then stating how they think the rules are broken. The Chair makes a ruling and “rules that the point of order is well taken” or “rules that the point of order is not well taken”. Appeals from the body can then happen, and that process utilizes the incidental motions.

### ADJOURNMENT

Adjournment is simply a formal way to close a meeting so everyone knows the session has come to an end. A motion must be made to adjourn, followed by a second, and then a majority vote. The time of adjournment is recorded in the meeting minutes.

### OTHER ITEMS

#### \*Things to remember as Chair:

- Memorize Constantly Used Procedures
- Make sure all know what’s being debated and voted on
- See that motions are clearly worded
- Repeat Wording of Motions Frequently – very important
- Make sure the Effects of Amendments are Clear to everyone
- Learn How to Conduct Voting
- Know the Steps in a meeting
- Learn How to Handle Points of Order
- Know more about Parliamentary Procedure than other members and you cannot go wrong.

#### Materials you should bring to all meetings:

- Have a copy of your bylaws
- Have copy of Robert’s rules or a simplified guide
- A list of all members and committees and their members
- Agenda

## **Key Points in the RTM's Rules to Regulate (Bylaws)**

21. Members of the public may speak once on each item upon such terms and conditions as the Moderator shall impose. General rule has been no questions, only comments. They don't speak following a report of sense of the body resolution.

22. Consent Calendar – With the unanimous approval of each committee having a quorum present, resolutions before that committee or committees will be placed on a Consent Calendar for concurrent voting at the Meeting without debate. Proposed ordinances are excluded.

25. No member may change his vote on a roll call after the vote has been announced by the Moderator

26. During any Meeting, the majority and minority leader may each call for one 10-minute recess, without the need for a vote, for the purpose of holding a political caucus.

32. All proposed ordinances shall initially be referred to the Committee on Legislation and Administration. All proposed ordinances subsequently shall be formally listed on the Warning for two Meetings and discussed by appropriate committees prior to each Meeting.

36. In order to give equal and proper consideration to the agenda, no item can be started after 11 pm, and no agenda item or any matter properly acted upon shall be discussed after 11:30 pm. If item is not waived, then items not completed or voted upon shall be continued the next day at the same place and time.

### **Other Miscellaneous Items that are important to know:**

- Grants under \$10,000 do not come to RTM
- Anything appropriated/expended that is over \$20,000 goes to RTM from BoF
- All bonding items go to RTM
- \$150,000 or more of approved expenditures/bond can go to referendum

### **FOI rules in regards to meetings/caucus:**

The definition of a meeting is a convening or assembly of a **quorum** of a body to discuss or act upon a matter over which the body has supervision, control, jurisdiction or advisory power. So as long as the group is less than a quorum, there can be no meeting under FOI. Therefore, as long as fewer than 21 members of the present RTM get together, there isn't a meeting.

**IMPORTANT** -- A caucus is never a meeting even though more than a majority of the members of the body might be present. Caucus members (which include ex-officio members) can participate in an e-mail exchange on substantive matters, and the e-mails are not public records and you are not engaged in an illegal meeting requiring notice. There is no terminology of "unauthorized caucus." If it doesn't fit the definition of a caucus, then you have an illegal meeting. If someone outside the caucus receives the e-mail from a caucus member, the whole chain becomes a public record.

## **SOURCES**

**The content of this written document comes directly from the following sources:**

- *Robert's Rules of Order Newly Revised In Brief*. Robert III, Henry M., Evans, William J., Honemann, Daniel H. and Balch, Thomas J., 2011.

- "Webster's New World Robert's Rules of Order, Simplified and Applied"

- *RTM Rules to Regulate: The Proceedings of the Representative Town Meeting of the Town of Fairfield*, Amended 9-24-07.

Any questions, feel free to contact me:

Jeff Steele

jrsteele@optonline.net

203-913-3754