

Interactive Rules of Order and Facilitating Board Protocols

Garden Grove, California
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8:30 to 10:00 a.m.

California Special Districts Association

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Board Protocols

1. Rules of Order (Robert's)
2. Appendices
 - a. The Evil Side of Parliamentary Procedure
 - b. Ranking of Selected Motions



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1. Rules of Order (Robert's)

The Shield to protect your rights.
The Sword to champion your interests.



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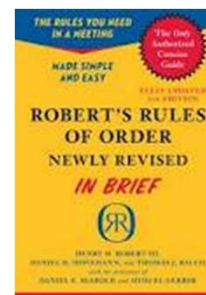
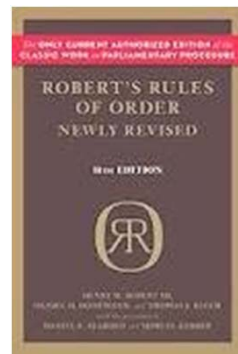
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Best Parliamentary Advice

- 🔪 Advice #1 – Read your Bylaws, and the Brown Act, before every meeting.
- 🔪 Advice #2 – If the answer is not in your Bylaws or the Brown Act, you will find it easily in Robert's.
- 🔪 Advice #3 – When in doubt for anything at all, read your Bylaws, and the Brown Act, again.



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Motion to Amend

A proposed motion can be perfected in one of 3 forms, if the proposed motion is concise and clear.

1. **Amend by Adding or Inserting:** Insert a word or phrase within the motion, or add a word or phrase at the end.
2. **Amend by Striking:** Delete a word or a phrase.
3. **Amend by Striking and Inserting:** Delete a word or phrase and insert another word or phrase.



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Drill 1: Amend a Motion

Form 1: Amend by Inserting or Adding.

Ch: The motion is to buy 3 computers. Are you ready for the question?

A: I move to amend by adding ...

B: Second

Ch: It is moved and seconded to amend the motion by adding ...

Are you ready for the question?

The motion is to amend by adding ...

All in favor indicate by ...

All opposed indicate by ...

The ... have it.

The motion to amend is ...

We are now back to the original motion (...as amended).



Drill 2: Amend a Motion

Form 2: Amend by Striking.

Ch: The motion is to buy 3 used iPads from online. Ready for the question?

A: I move to amend by striking ...

B: Second

Ch: It is moved and seconded to amend the motion by striking ...

Are you ready for the question?

The motion is to amend by striking ...

All in favor indicate by ...

All opposed indicate by ...

The ... have it.

The motion to amend is ...

We are now back to the original motion (...as amended).

Drill 3: Amend a Motion

Form 3: Amend by Striking and Inserting.

Ch: The motion is to buy 3 computers from online. Ready for the question?

A: I move to amend by striking ... and inserting ...

B: Second

Ch: It is moved and seconded to amend by striking ... and inserting ...

Are you ready for the question?

The motion is to amend by striking ... and inserting ...

All in favor indicate by ...

All opposed indicate by ...

The ... have it.

The motion to amend is ...

We are now back to the original motion (...as amended).

Motion to Refer

- ✚ When a body needs more time or more information during the handling of a motion, it may refer the main motion to a Standing Committee or to a Special Committee.
 - ✓ Script B: [Motion to Refer](#)
- ✚ A Special Committee may be created, but it needs the following pieces of information:
 - ✓ Number of members
 - ✓ Name of chair and members
 - ✓ Instructions on action, and what date to report back



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Motion to Postpone

- ✚ Sometimes the board needs more time to obtain information to make an intelligent decision.
- ✚ Sometimes your buddies are not at the meeting, and you do not want the vote to be taken without them.
- ✚ Move the motion to Postpone (Not “to Table”).
 - ✓ I move to postpone the main motion until the next meeting. (Never beyond)
 - ✓ I move to postpone the main motion until after the lunch break.
 - ✓ I move to postpone the main motion until 3:00 p.m.



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Motion to Lay on the Table

- ✚ If you have seen this motion used, you have seen it used incorrectly.
- ✚ Valid only for a Temporary Emergency.
- ✚ Not valid to Kill or to Postpone a main motion.
- ✚ May be qualified as to “reason” but not as to “time”.
- ✚ Move the motion to Lay on the Table.
 - ✓ Mr. Chair, since our guest speaker needs to take an early flight, I move that we table the main motion.
- ✚ The tabled motion is “taken from the table” at any time, or it will die by the end of the next meeting.

Point of Order and Appeal

- ✚ A member notices a violation of a rule.
- ✚ Without waiting to be recognized, the member must call out, **“Point of Order”**.
- ✚ The Chair listens to the complaint and rules whether there is a violation. (“Point well/not well taken”)
- ✚ If the member disagrees with the chair’s ruling, the member may call out, **“I appeal from the decision of the chair.”**



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Appeal Process

1. Chair explains the reason for his/her ruling
 2. Each member who wishes may debate one time
 3. The Chair gives a closing statement
 4. A vote is taken on **“Shall the decision of the chair be sustained?”**
 5. Only a majority in the negative will overturn the ruling of the chair.
- Script C: [Point of Order and Appeal](#)



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Suspend the Rules that ...

- ✚ Often, a group has a need to perform a certain task, but a rule may exist that prohibits that task. The group can move to **“Suspend the rules that prohibit ...”**
- ✚ **BEWARE:** You never ‘Suspend the Orders of the Day’ (= the agenda), or ‘Suspend the Rules’ (= Robert’s).
- ✚ The problem is to determine which rules may be suspended, and what vote would be required.
 - ✓ Drill: [Suspend the Rules](#)



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2. Appendices

How to beware of other members' intentions;
How to exploit your motion's ranking among
the other motions.



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Evil Side of Parliamentary Procedure

- ✚ As in the implementation of any rules, most members will figure out how to use the rules to their advantage at your expense.
- ✚ Let Parliamentary Procedure be
 - ✓ A Shield to protect your rights
 - ✓ A Sword to champion your interests
- ✚ [Rules as Sword or Shield](#)



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Ranking of Selected Motions

- ✚ Not all motions need a second. Not all may be amended or debated. Not all require a majority vote to adopt. Not all need a vote for adoption.
- ✚ Some motions have a higher ranking in power than other motions.
- ✚ This chart will illustrate all of these features.
 - ✓ [Ranking of Motions](#)



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You and the Rules

Your goal is to uphold the objectives of your organization as described in the bylaws, and to protect the rights of the organization's members.



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Thank you for your participation.



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