

# Robert's Rules: What You Should Know

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Robert's Rules do help you run an effective meeting. And you don't have to know a whole book's worth of details—just a few key concepts.

If you've ever been tempted to tell someone to "just shut up" when you were conducting a meeting and couldn't figure out how to get her to sit down, there's a guy named Robert with some rules you ought to know about. Now, lots of people groan when they hear Robert's Rules of Order mentioned. They think of some overly complicated stuff about primary motions, points of order, and moving the question. Conducting a meeting is enough work. Why deal with all that?

Certainly when Major Henry M. Robert published his famous primer in 1876 on parliamentary procedure, he wasn't thinking about parent groups. And his rules to "assist an assembly to accomplish in the best possible manner the work for which it was designed" go far beyond what a typical parent group might need. After all, they're used in the United Nations, where debate gets a little more complicated than what the next fundraiser should be.

The genius of Robert's Rules is that they work well for groups of all sizes and types. If you simply read through the rules, all of those terms and the complexity tend to conceal his key concepts. Used with a little assertive leadership, they keep a meeting organized and flowing.

1. 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.
2. Let committees do their work. Your general meeting is to resolve the major issues. Save everybody's time by letting committees deal with the smaller details.
3. Don't allow crosstalk. Require all speakers to address the chairperson. This helps you keep control and ensures everyone will hear the business at hand.
4. Limit discussion to the topic at hand. Keep things focused, and don't be shy about asking speakers to deal only with the current topic.
5. Cut off discussion when it becomes redundant. For controversial issues, setting a time limit for each speaker can help. When discussion becomes circular, summarize the points on each side and ask for anything new—or shut off discussion by calling for a motion.

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. Parent groups that limit meetings to one hour have much better luck getting people to return the next month. As for the terms and procedures you find in Robert's Rules, there are a few fundamentals that you should know.

## Agenda

The agenda is a detailed list of specific items, in the sequence in which they will be covered. Use a consistent order of business from meeting to meeting and distribute hard copies of the agenda to attendees. Post the agenda ahead of time at the school and on your website so members know what

issues will be discussed at the upcoming meeting. And be specific. Don't just list "unfinished business." State what items of unfinished business will be covered.

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

1. Welcome
2. Approval of minutes (from last meeting)
3. President's report
4. Treasurer's report
5. Principal's report
6. Committee reports
7. Unfinished business
8. New business
9. Announcements (including date and time of the next meeting)
10. Adjournment

## **Motion**

A motion is a formal way to propose something on which the group should vote. The proposer says, "I move that..." and clearly states what is being considered. Someone else "seconds" the motion. Guided by the president, the group discusses the motion until they are ready to vote. Finally, the president 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.

## **Quorum**

A quorum is the minimum number of members required to conduct business at a meeting. Usually this number is stated in the group's bylaws. If a quorum is not indicated in the bylaws, Robert's Rules of Order sets it at a majority of members.

## **Minutes**

The minutes are the permanent record of the business conducted during a meeting, typically prepared by the group's secretary. They include details such as the date, time, and location of the meeting, whether a quorum was present, and the presiding officer. Specific motions and their outcomes (but not exact vote counts) are also included in the minutes. Discussion is not documented in the minutes. The minutes for each meeting are presented for the assembly's approval at the next meeting.

## **Adjournment**

Adjournment is simply a formal way to close a meeting so everyone knows the session has come to an end. The time of adjournment is recorded in the meeting minutes.

## Tabling a Motion

If it is clear that a motion cannot or should not be voted upon at the current time, it is typical to postpone (“table”) it until the next meeting. Technically there should be a new motion to table the current motion, but most groups can agree to delay discussion without layers of parliamentary procedure. Often, it helps to appoint a committee or a member to study the issue and report back to other members at the next meeting. This tactic can save time on circular debate, especially when all of the facts aren’t available.

## Resources

There are many guides to Robert’s Rules. If you’d like a reference, go with an abridged version such as Webster’s New World Robert’s Rules of Order, Simplified and Applied. Sticking to a few simple rules can make meetings more pleasant for everyone, from the president to first-timers.

# Robert’s Rules: Sticky Situations

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Straight answers to common questions about voting, agendas, and best practices for your meetings.

### **Last month, a parent came 15 minutes early to our PTO meeting, asking to be put on the night’s agenda. The president told her it was OK and added her name and edited the agenda to include her that evening. Was this OK?**

Yes. The purpose of an agenda is to allow you to do business one item at a time and in an orderly way. It helps keep your meeting on track and prevent the confusion that can happen when several topics are discussed at the same time. An agenda isn’t intended to limit what can be discussed. Some groups do have a requirement that agenda items be submitted in advance so the agenda can be printed and distributed or perhaps emailed to members before the meeting. Even in these cases, though, there should be a point during the meeting where the president asks for “new business” or “further business.” That’s a time when any member can bring up a topic that’s not formally listed on the agenda.

### **Do teachers get to vote?**

This is a bylaws question, and the answer is different depending on the parent group. If teachers are considered members of your PTO, if the bylaws don’t specifically say that teachers aren’t allowed to vote, and if a teacher is a member in good standing, then yes, she can vote. Some PTOs define a member as a parent or guardian of a student in the school. If that’s the case, a teacher would not be allowed to vote unless she has a child enrolled at the school.

### **What happens if we have a tie vote? Does the president get to decide the election?**

The answer actually depends on how your vote was held. If it was a secret (paper) ballot and it ended in a tie, Robert’s Rules of Order calls for a new vote, preferably held the same night. Usually this only applies to an election of officers, since most other votes are typically done by a show of hands.

If the vote was a show of hands and the president, as the person presiding, didn't vote, then Robert's Rules allows the president to vote to break the tie. The important point here is that the president doesn't get to vote twice. If her vote was counted and the result was a tie, then you need to vote again. If her vote was not counted, then her vote breaks the tie.

**Our PTO board is about to vote on an important issue. Some members are uncomfortable about this vote and are choosing to abstain. One member thinks that if you abstain from voting, that is a nay vote. Is this accurate?**

No. When someone abstains, the vote isn't counted at all. So if a vote is 15 yes, 14 no, and 3 abstentions, then the measure passes.

There is one case in which abstentions have the effect of counting as nay votes. That's when a specific percentage of votes are required to pass a measure. For instance, you might need a two-thirds majority to revise your bylaws. In that case, an abstention acts as a nay vote because it keeps you from reaching the required minimum number of votes. For example, if you have a quorum of nine people and 5 vote yes, 3 vote no, and one abstains, the measure wouldn't pass because you didn't reach the required two-thirds majority of 6 votes. This type of case is fairly rare, however.

**Our president "tabled a motion" when it came to voting on buying a new playground. Does that mean she has turned it down?**

Tabling a motion just means your group is postponing voting on the motion, usually because more information is needed. Technically, the presiding officer shouldn't be making motions—she can suggest that a motion be made to table an item, but another member has to do so and a vote should be held to approve that motion. On the other hand, most groups can agree to delay discussion without layers of parliamentary procedure. It's a good idea to have your playground committee study whatever issue you're concerned about and report back at the next meeting. Letting committees do this kind of work can save a lot of unnecessary debate.

**What issues get voted on at a general meeting vs. a board meeting?**

There isn't really a set answer to this; it depends on how your group operates. Some groups have only occasional informational meetings for the general membership, and the board handles most of the real business. Other groups have regular monthly general meetings, and they do much of the group's major business at those meetings.

There are only a few things that must be voted on by the membership, mostly involving changes to the group's structure, such as a bylaws amendment or revision. Your bylaws may specify other required votes, such as approval of an annual budget. It also may make sense to vote on things for which you want broad-based support, such as creating a major new program.

Members have the right to vote on other items or change the board's decisions by raising topics at general meetings. But as a rule, you shouldn't be voting on which cookie dough company to choose for

your fundraiser or whether the color scheme for the auction should be blue and white or green and yellow. Those types of nitty-gritty items are best handled by committees and the board. Keep your general meetings short, friendly, and informational.

**Our secretary thought she had the recorder on at our meeting, but the battery died and she did not get everything. How can we rewrite our minutes accurately at this point? Do we need to hold another meeting?**

Meeting minutes are a record of what was done at a meeting, not a record of what was said. So you don't need to recreate the debate. You just need to remember what decisions were made. You and your officers should be able to take a look through the agenda and recall what actions were taken. If you approved any expenditures, your treasurer should have notes on those.

**Are PTOs subject to public open meeting laws?**

No. Open meeting or "sunshine" laws are aimed at municipal and state government proceedings. Although PTOs serve schools, as independent nonprofit organizations they are not subject to the provisions of sunshine laws. Still, the best practice is to conduct PTO business in the open and to make your actions as transparent as possible. The more open you are, the better off you'll be in terms of building support and involvement.

**One of our parents is going on vacation and would like to submit a proxy vote against an expenditure at an upcoming PTO meeting. Can her vote be counted?**

Unless your bylaws specifically allow proxy voting, her vote doesn't count. We recommend against proxy voting, and Robert's Rules of Order states outright that nonprofit organizations should prohibit it. Proxy voting makes sense when there's a financial interest at stake, such as at a stockholders meeting. But it can be a tangled web if there's a dispute over whether the proxy was really authorized to vote for the absent member or if the proxy doesn't vote the way the member intended.

**We are about to vote on which fundraiser company we will use in the fall, and one of the vendors we'll be voting on happens to be a member of our PTO. Isn't this a conflict of interest, and shouldn't we tell her that she is unable to vote on this matter?**

According to Robert's Rules, you can't prevent a member from voting because of a perceived conflict of interest. The best practice would be for her to voluntarily not vote, but you can't force her to abstain. Also, you should be sure to bring up her affiliation before you vote on the fundraiser, in the interest of full disclosure. If you don't, you may find yourselves accused of playing favorites instead of doing what's best for the school.