

How to make, amend, discuss and handle MOTIONS in meetings

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Why I think you're here

- You want to know the process for making motions and voting in meetings.
- You've had some issues in the past which could have gone...better.
- You want to learn what the "rules" say can be done, and what can't be done. --OR--??

Agenda

- Audience: everyone!
- Robert's Rules 101
- Most common motions you'll use
- Things to watch out for
- An easy script for handling motions
- A few helpful suggestions
- Practice time!

Ask questions anytime you wish!

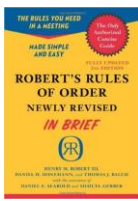
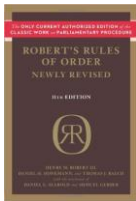
Robert's Rules

This guy was fed up with inefficient meetings...



Your guidebook

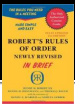
- There are a ton of resources on the web, but the definitive resource is *Robert's Rules of Order Newly Revised, 11th Edition*.



Robert's Rules of Order

- Although more than 100 years old, it was the basis for parliamentary law for decades.
- Used by Senate and House daily
- Used by thousands of organizations
- Updated to reflect current times, including concepts such as electronic meetings.
- It is *our* parliamentary authority, in bylaws
- Relevant, current, helpful and flexible

Robert's Rules In Brief...




- As a Parliamentarian, you still may not need the full version unless this stuff really interests you and you want to learn more.

Another option:


- National Association of Parliamentarians
 - Classes, online training, in-depth resources
 - Local units and local training/collaboration

Basic principles



- Democratic in nature
- Protects the rights...
 - ...of the majority to decide
 - ...and the minority to be heard
 - ...to consider one item at a time
 - ...to hear both sides of the issue
- Based in **common sense**
- Created to create efficient meetings

How does it help efficiency?



- Provides a structure for meetings, e.g.:
 - Agenda
 - Minutes from previous meeting (reminder)
 - Officer reports
 - Committee reports
 - Unfinished business
 - New business
 - Announcements
 - Adjournment

How does it make things fair?

- Members get their say by...
 - Presenting motions to be considered
 - Someone else who agrees it should be discussed
 - Multiple clear restatements of the motion
 - Debate and discussion on the topic (structured)
 - Both sides, all sides, respectful of time
 - Voting (or otherwise handling a motion)

Is it formal or informal?

- Both!
 - Formality* lends structure and confidence
 - Formality* guides decisions
 - Formality* helps you decide the best course of action
 - Informality* because we aren't always formal ☺
 - Informality* reflects how we function
 - Informality* makes meetings proceed quicker
 - Informality* makes people feel more comfortable

RONR recognizes both, and supports both

Motions

Assuming you have a quorum...



Standard process

When you want to make a formal decision, it starts with an idea

1. Idea

2. Any member makes a motion, which is just a formal way of proposing an idea.

3. Any other member seconds the motion, which means the motion will be discussed further.

4. The group discusses the motion (and only the motion) until you are ready to...

5. Vote or dispose

6. Announce results

Wait on the motion if there are enough members in attendance -- or --
Vote on the motion

Table the motion until the next meeting, to allow time to consider the idea further.

Definitions...

- Recognition can be by raising hand, getting on the agenda, or speaking between topics.
- A second is NOT showing support for an idea, only agreeing that it's worth hearing.
 - Does *not* need to be recorded in minutes
 - Motions from committees do not require second

Step 1 – Make motion

"Ms. President, I'd like to make a motion to buy a new playground shade for \$500."

- Wait/ask for a "second." If none, move on.

"There is a motion to buy a new playground shade for \$500. Is there any discussion?"

- And you're off...

Step 2 - Debate

- Can be informal, but should be orderly
- Maker of motion has right to speak first
- Should alternate views (for and against)
- Limit to three minutes per speaker, twice
 - Options for limiting or extending (or in SR's)
- Once no more discussion, call for the vote

Tailor to fit your unit, but remember that this process supports an efficient meeting.

Step 3 - Vote

- Begins after chair restates the motion
- Generally a majority adopts (or rejects)
- Always starts with a (1) voice vote
- If there is any doubt, or a call for "Division"
 - (2) Show of hands or stand for the count
 - If *still* not clear, can move to a (3) roll call
 - Later, can require (4) ballots, but more complex
- Use "if there are no objections..." frequently

You're an Expert!



Reality

The previous slides covered 90%

The 10% remaining can occur...

Second most likely to occur


- Amendments
 - A way of restructuring the motion to add clarity or to change some details.
 - Must *always* be germane to the original motion
 - Cannot change the substance of the original motion
 - Must be seconded, is debatable, majority adopts
- Work your way from the inside out
- Each adoption changes the previous motion

Simple amendment examples

- "I move to amend the motion to buy a shade by striking '\$500' and inserting '\$1000'."
- "I move to amend the motion of creating a committee by adding 'meeting on Tuesday' after 'three people'."
- "I move to amend the previous motion by striking 'at Jack in the Box'."

More complex amendments

- "I move to **amend the motion** to **refer the motion to a committee** by striking 'to report no later than Tuesday' and inserting 'to provide a written report at the next board meeting'."
- "I move to amend the bylaws, Article IV, Section 4(a), by striking 4(a) completely, and by inserting 4(g) to read '...'"



Multiple amendments example

Who	What	Spiraling down
Person A	"I move to buy a shade for \$500"	
Person B		"I move to amend the motion by striking \$500 and inserting \$1000"
Chair	<i>If adopted, becomes...</i>	The motion is now to "buy a shade for \$1000"
Person C		"I move to amend the motion by inserting 'not to exceed' before 'for \$1000'"
Person D	<i>(three levels deep now...)</i>	"I move to amend the motion by adding 'without board approval' after 'exceed'."
Chair	<i>If adopted, becomes...</i>	"I move to amend the motion by inserting 'not to exceed without board approval' before \$1000"
Chair	<i>If adopted, becomes...</i>	The motion is now to "buy a shade not to exceed without board approval for \$1000"

Amendment hints and tips

- **Always** work your way from inside out
- If the amendment was adopted, the chair should always restate new motion.
- If rejected, motion stays as currently stated
- Don't get bogged down in formality; use common sense and *reject* or *restate* if helpful.
- There is no concept of a friendly amendment, but you can use "**if there are no objections...**"

Dispensing with motions

Or, how to move on when you're hopelessly stuck...



Useful options in lieu of voting

- *Call the previous question*
 - Ends debate early; *requires 2/3 to adopt*
- *Refer to a committee*
 - Gives it to someone else to discuss/resolve
- *Lay the motion on the table or postpone*
 - Need to move on, but we'll come back, -or-
 - We will come back to topic at 3pm
- *Postpone indefinitely*
 - Effectively kills an ill-considered motion

Remember...

- All of those require a second, most are debatable (see MOTIONS chart) and most require a majority vote to adopt. Some can be amended (e.g., postpone until a later time).
- If you're restricting rights, requires 2/3 vote
- Consider *why* you're dispensing with motion
- Don't abuse the privilege

There is a precedence

Applies to when a motion is in order

Order of Making Motions

FIX THE TIME TO WHICH TO ADJOURN

ADJOURN

RECESS

RAISE A QUESTION OF PRIVILEGE

CALL FOR THE ORDERS OF THE DAY

LAY ON THE TABLE

PREVIOUS QUESTION

LIMIT OR EXTEND LIMITS OF DEBATE

POSTPONE TO A CERTAIN TIME

REFER TO A COMMITTEE

AMEND

POSTPONE INDEFINITELY

MAIN MOTION

Order of Voting on Motions

Out of Order

Some helpful motion rules

Motions must be in order (i.e., relevant to topic)

Should not interrupt speaker (incidental motions)

Motion maker can re-word prior to chair announcing

Things you cannot do:

Suspend the rules, or make your own rules

Do anything against the PTA bylaws

Motion Form

Sample Unit PTA

MOTION FORM

Motion #: _____

I move that...

At a cost not to exceed: \$ _____ Money to come from: _____ Budget line: _____

To take place on: _____ At location: _____ Chaired by: _____

Maker: _____ Date: _____ Seconded? Y / N Adopted? Y / N

Resulting action: _____

Recap: voting steps

- Basic principle of 2/3 vs majority
- Majority & 2/3 = count + 1
- Start with a (1) voice vote
- If there is any doubt
 - (2) Show of hands or stand for the count
 - If *still* not clear, can move to a (3) roll call vote
 - Or (4) ballots, but that can be more complex

The people

- Chair **always rules** on questions
 - Can appeal decision, or ask for clarification
- Parliamentarians only advise or interpret
 - Can help both chair and motion-makers
- Secretaries record motion and outcome
- Bylaws explain who is allowed to vote

To do this...you say...

TO DO THIS	YOU SAY THIS	May you interrupt speaker?	Must you be recognized?	Is the motion debatable?	Vote required
Adjourn the meeting	I move that we adjourn	no	yes	no	majority
Recess the meeting	I move that we recess until	no	yes	no	majority
Complain about noise, room temperature, etc.		yes	no	no	no vote
Suspend further consideration of something	I move that the motion be laid on the table	no	yes	no	majority
End debate	I move the previous question	no	yes	no	2/3 vote
Postpone consideration of something	I move we postpone this matter until	no	yes	yes	majority
Have something studied further	I move to refer the motion to the committee	no	yes	yes	majority
Amend a motion	I move to amend	no	yes	yes	majority
Introduce business (a primary motion)	I move that...	no	yes	yes	majority
Object to procedure or to a personal affront	Point of order	yes	no	no	chair decides
Request information	Point of information	yes	no	no	no vote
Ask for a vote by actual count to verify a voice vote	I call for a division	no	no	no	no vote
Object to the consideration of some undebatable matter	I object to the consideration of this question	yes	no	no	2/3 vote
Take up a matter previously tabled	I move to take from the table	no	yes	no	majority
Reconsider something already disposed of	I move to reconsider...	yes	yes	yes	majority
Consider something voted out of its scheduled order	I move we suspend the rules and consider	yes	yes	no	2/3 vote
Vote on a ruling by the chair	appeal from the decision of the chair	yes	yes	yes	majority

Practice time!



Practice #1 – simple motion

- A member raises their hand and says...

"Ms. President, I move that we host a fundraiser barbeque next month."

■ What should the chair do next?

Practice #1 – simple motion

- 1) Make sure the motion is in order!
 - a) Not interrupting any other business
 - b) At an appropriate place in the agenda
- 2) Wait for a second, or call for a second

A member says "Second"...
- What comes next?

Practice #1 – simple motion

- The chair repeats the motion for everyone
"The motion before you is that we hold a fundraiser barbeque next month."
- The chair asks if there is any discussion
"Is there any discussion?"
- Discussion ensues, and then fades to a stop.
What should the chair then say?

Practice #1 – simple motion

"Is there any further discussion?"

- None is heard, so the chair restates the motion, and asks for the vote.
"The motion before you is that we hold a fundraiser barbeque next month."
"All those in favor say 'aye'. All those opposed, say 'no'."
- The motion is adopted – Done!

Standard process

When you want to make a formal decision, it starts with an idea

1. Idea

2. Any member makes a motion, which is said

3. Any other member seconds the motion

4. The group discusses the motion and only the motion until you are ready to...

Vote on the motion if there are enough members in attendance - then select a question

Table the motion until the next meeting, to allow time to consider the idea further

- Get recognized
- Make a motion
- Obtain a second
- State the motion
- Debate it
- State it again
- Vote or dispose
- Announce results

Practice #2 – simple motion

- A member raises their hand and says...

"Mr. President, I move that we send \$400 to the library for new books."

No second is heard, even after prompting.
What happens next?
- The chair moves on to the next item

Practice #3 – amendment

- A member raises their hand and says...

"Ms. President, I move that we host a fundraiser barbeque next month."

It has been seconded, and is being discussed

Practice #3 – amendment

- A member raises their hand and says...

"Ms. President, I move to amend the motion by inserting 'Hawaiian' before 'barbeque'. "

It is seconded, and no discussion is heard, so after a vote, it is adopted. What should the chair say next?

Practice #3 - amendment

"The motion now before you is to host a fundraiser Hawaiian barbeque."

- Discussion continues...Vote...Announce
- Only the last version of motion is recorded in the minutes, but you can indicate "amended".*

Practice Situations

- Discussion is running way too long
- Answer:
 - Remind members about limits of debate
 - Two times, alternating, for 3 minutes each
 - Or, maybe extend debate time
- Someone has "called the question"
- Answer:
 - Requires 2/3 vote to adopt

Practice Situations

- No one has the answers right now
- Answer:
 - Refer to a committee
 - Postpone to a later date
- Someone wants the votes counted
- Answer:
 - Division; standing vote or raised hands

Practice Situations

- An amendment to a motion is pending, and someone wants to refer to a committee.
- Answer:
 - Allowed; it's a higher precedence
- Someone wants to refer to a committee, and debate is proceeding. Someone offers an amendment to the original motion to help.
- Answer:
 - NOT allowed; lower precedence

Practice Situations

- Motion to lay on the table – how get it back?
- Answer:
 - A motion to pick up from the table later
- Motion to postpone indefinitely
- Answer:
 - Kills a motion, essentially
- Calls for the orders of the day
- Answer:
 - Polite request to get back on agenda

Practice Situations

- Principal needs to get back to work
- Answer:
 - Lay on the table
- A snack is being served
- Answer:
 - Recess for 5 minutes
 - If donuts, recess for 15 minutes

A meme featuring the character Sheldon Cooper from 'The Big Bang Theory'. He has a surprised expression, with his mouth open. The text 'DID YOU SAY' is at the top and 'DONUTS???' is at the bottom.

Practice Situations

- There is a motion to amend a bylaws section talking about membership rules.
 - A member wants to amend the motion to specify exact meeting start times.

Is it in order?

- No – not germane to original amendment

When all else fails

- Use common sense
- Don't rush – ask for help
- Don't shy away from delaying, or calling special meetings to handle issues.
- Remember that you can always (Amend, Rescind or Reconsider) just about anything.
 - Can't un-spend money, or un-sign contracts

Resources / References

- CAPTA Toolkit:
 - <http://toolkit.capta.org/running-your-pta/meetings/parliamentary-procedure/>
 - <http://toolkit.capta.org/job-descriptions/parliamentarian/>
 - <http://toolkit.capta.org/running-your-pta/bylaws/>
 - <http://toolkit.capta.org/running-your-pta/bylaws/changing-bylaws/>
 - <http://toolkit.capta.org/running-your-pta/nominations-and-elections/>
 - <http://toolkit.capta.org/running-your-pta/bylaws/violations-of-pta-bylaws-policies-or-procedures/>
- CAPTA Website:
 - <http://capta.org/pta-leaders/run-your-pta/bylaws-and-standing-rules/>
 - <http://capta.org/pta-leaders/run-your-pta/parliamentary-procedure/>
- External Websites:
 - <http://www.parliamentarians.org/>
 - <http://www.californiaparliamentarians.org/>
 - <http://www.ninthdistrictpta.org/pta-leaders/running-pta/parliamentarian/>
 - <http://www.parliamentarypro.com>

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Q&A