

Preface

Are you frustrated by meetings that lack efficiency ... fail to move smoothly through an agenda ... lose order and professionalism due to emotional outbursts ... or do not foster constructive decision-making that truly represents the wishes of the membership?

You're not alone. And it doesn't have to be that way!

After years of volunteering their time for community groups—including attending hundreds of professional and nonprofit meetings—Fred and Peg Francis recognized the need for a concise, authoritative resource to assist boards of directors, committees, and other organized groups seeking to fairly represent their memberships by hosting efficient, effective meetings.

Because they could not find such a resource, they created one. It took several years

of refining (and a great deal of input from executives, parliamentarians, and other users) to perfect the rules, to be sure that each point was crystal clear, and that not a single necessary rule was missing. Introduced in 1994 as *Distinctly Democratic Rules of Order* (changed to *Democratic Rules of Order* in later printings), this easy-to-use book has become a respected and valued reference for thousands of organizations, large and small, and for students being taught the democratic process in classrooms around the world.

Used By Diverse Groups

From unions and professional associations to strata councils, churches, and nongovernmental organizations, *Democratic Rules of Order* is a “pocket guide” setting out a step-by-step process that allows all members to participate in the exchange of ideas and group decision-making, including virtual meetings.

The book can be read in less than an hour and is intentionally small, so it is easy to carry to meetings for on-the-spot reference when a question arises.

Easy-to-use Format

To make it easy to follow, the book is divided into two parts. *Part 1: The Rules* describes organizational structures and members' roles, and it includes step-by-step procedures for handling the most critical part of any meeting: the decision-making process. It helps the reader navigate through the democratic processes of:

- introducing ideas
- making motions and amendments
- handling points of order and disturbances
- managing the voting process
- working on and with committees.

Part 2: Further Help provides additional important reference information, including:

- frequently asked questions
- a scripted example of a meeting that uses all the key elements of *Democratic Rules of Order*
- a flowchart that illustrates the rules of order
- a summary of the rules of order for quick reference during a meeting.

Since 1996, this book has been a best seller in Canada. By reaching a wider audience with

this 10th edition, the authors hope to improve the world, one meeting and one decision at a time.



PART 1

The Rules

Introduction	3
Governing Elements	9
Members Making Decisions	13
Keeping Meetings Flowing	31
Committees and Small Meetings	37

Introduction

Fairness and Orderliness

These parliamentary rules of order help people to deliberate and consider ideas together, and then make decisions as wisely, fairly, and easily as possible. These rules are relevant for meetings of any size that are undivided by organized political parties. Ideally, decisions are based on objective consideration of facts, unaffected by emotions, group pressures, or unnecessary protocols. The purpose of this book is to help your organization reach this ideal.

Democratic Principles

This book is not an abridged version of other books. It is a complete set of rules determined by common practice and the natural laws of democracy—“rule by the ruled,” as Webster’s dictionary puts it. These self-evident

principles, when applied to decision-making meetings, include:

- **the right of each individual member** to participate equally and fully in orderly meetings that are free from intimidation, filibustering, and other disturbances and in which all members will follow the same easily understood rules, including the right to be equally and fully informed of all events, whether a member is present or not
- **the right of the majority of members** to make the decisions.

A Democratic Ideal

We should remember that we all belong to the same organization, with a common purpose. We can have widely differing views and still work together for a common good without dividing into opposing sides, each trying to get its own way. The best decisions are made when we listen thoughtfully to the information being presented and then make our own decisions privately.

Another Democratic Ideal

Must we accept a legal decision if it is a bad one? Yes and no. Yes, because, to practice democracy, we must accept the decision and do

what it requires us to do. No, because we are not required to change our opinion. At some later date, the opportunity may occur for a review of the decision or we may even find that the decision was good after all!

Degrees of Formality

In small or close-knit groups, decisions can often be made by consensus or general agreement, provided that the chair or secretary recording each decision is sure that most members agree (see pages 15, **Informal Chair**, and 37, **Less Formality**).

Large groups, too, often make decisions informally. The mover's privilege (see page 19, **Mover's Privilege**) allows cooperative members to work out decisions quickly and easily. A more formal amending process is automatically required if opinions are divided. The degree of formality is usually determined by custom, agreement, or a law as defined in the next paragraph.

Higher Laws

Rules of order are automatically overruled when a law of the land, a constitution, a bylaw, or an existing standing rule applies.

Throughout this book, we refer to any of these as a *law*.

Rules of order apply to the conduct of meetings only. They do not interpret laws or make up for deficiencies in bylaws or standing rules.

Minority Rights

While a democratic majority rule system may appear to be in conflict with minority rights, remember that there are higher laws that protect minority and individual rights. Nearly all nations have laws that protect the natural rights of all individuals, including the UN's Universal Declaration of Human Rights (UDHR). No group may make a decision that would violate universally recognized human rights and fundamental freedoms.

For Maximum Efficiency

Sharing the decision-making process in meetings is like driving a car. There are rules to be learned and skills to be attained. Once this has been done, group decision-making is second nature, like driving. If each member reads this book thoughtfully at least once, and

if the chair does the same at least twice, and if members agree to follow these rules, your meetings should move as easily as the car of an experienced driver who can drive competently without wondering which pedal to press.

The Tenth Edition

The tenth edition, like each previous edition, has been revised to make the book clearer, more useful, and easier to work with. However, the rules of all editions are so similar that organizations can use earlier editions along with the latest edition without conflicts.

Virtual Meetings

These rules, modified if necessary, can be used for telephone or video conference meetings and for computer-connected meetings in which discussions and voting are done electronically.

To Adopt or Modify These Rules of Order

Add to the standing rules or bylaws a statement such as: “This organization’s meetings shall be governed by *Democratic Rules of Order*.” You could also add: “Members’ general meetings shall be conducted by a formal chair,

and the executive board's meetings shall be conducted by an informal chair" (see pages 14 and 15, **Formal Chair and Informal Chair**). Similarly, modifications can be made to these rules to make them conform to an organization's special needs.

An Impersonal Referee

These rules are complete. When adopted, they form the official rules of order for your organization's meetings. This book is your parliamentarian—or referee—when needed.

Governing Elements

Good governance has structure.

Government Control

The governments of some jurisdictions require that the constitution and bylaws of incorporated societies be approved by the members and that reports be submitted annually.

Constitution

A constitution is a short document stating the name and purpose of the organization. Changes to a constitution may require advance notice, a large majority of votes (e.g. two-thirds or three-quarters), a secret ballot, and/or government approval if the organization is incorporated. Indeed, some clauses may be unalterable, so an organization might have to be disbanded and reformed to change them. Many unincorporated organizations today are formed without constitutions and place all governing rules in their bylaws.

Bylaws

The governing rules of the organization, covering topics such as membership, officers, elections, duties, finances, meetings, quorum, discipline, amendments, and the seal. Changes to the bylaws may require advance notice, a large majority of votes (e.g. two-thirds or three-quarters), a secret ballot, and/or government approval.

Standing Rules

Standing rules are a record, usually in list form, of previously made decisions that provide future guidance. Standing rules can be changed by a majority of votes at any regular meeting, provided a quorum (the minimum number of members required to be present, see page 15, **Quorum**) is present.

Unless all members are present and none object, changes to an existing standing rule governing the conduct of members' meetings apply only to future meetings. Some organizations require advance notice before a decision listed in the standing rules can be changed (see page 50, **Q17**).

Rules of Order

A set of rules, established by the standing rules or bylaws, by which the members agree to govern their meetings. This book supplies a complete set of rules that can be used by any organized group. Rules of order are subject always to the laws of the land, the constitution, the bylaws, and existing standing rules, any of which we call a *law* in this book.

Executive Board

A group of members elected for a limited time to conduct the organization's business in accordance with the members' wishes. Their responsibilities and limitations are specified in the bylaws. Their authority lies only with the whole board, and no single member should assume any special authority or responsibility unless such powers have been delegated to that individual by the board. When a person serves in a capacity such as "Director," "Strata Council Member," "Trustee," or "Governor," that person is still obligated to act in complete compliance with the will of the members.

Officers

President, vice president, secretary, treasurer, etc., elected by the members or appointed by the executive board for a limited time. Their responsibilities and limitations are specified in the bylaws. In some organizations, the officers form part or all of the executive board.

Election Procedures

Usually found in the bylaws and stating when elections are to be held, the requirements and terms of office, nominating and voting procedures, balloting, and the number and appointment of vote counters.