

Robert's Rules For Dummies

Bonus Chapter

The Convention of Delegates: A Special Kind of Assembly

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In This Chapter

- ▶ Understanding the special nature of a convention of delegates
 - ▶ Organizing a convention of delegates
 - ▶ Using specialized convention committees
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If you've never been a delegate to a convention, then you've probably only heard about the fun part. You may think that a convention is all about trading pins and patches, wearing funny hats, and waving flags. You may even think it's mostly about dodging balloons and confetti while a band plays the theme from *Rocky*, after which everyone parties until all hours of the night.

Now, I don't want to dash any of your illusions, because honestly, some conventions are like that. But if you've ever been to a convention where you were an official delegate representing your local or state unit, you know that everything's not all fun and games. Work needs to be done to establish your organization's direction for the next year (or two, or four).

The conduct of business in a convention is in most ways the same as in regular meetings. Despite its size and specialized structure, a convention of delegates is, after all, still a deliberative assembly (see Chapter 3 in *Robert's Rules For Dummies*), and all the usual rules about meetings, motions, voting, elections, and so forth still apply.

However, some important differences need to be recognized. The organization of a convention is quite unique and is distinguished in

several ways from the run-of-the-mill Annual General Meeting of an organization. These differences create the need for some special rules to make the convention an efficient and proper operation. And you're in luck — this chapter covers those special rules for properly conducting and participating in conventions.

Defining the Convention of Delegates

A *convention of delegates* is an assembly of representatives from smaller constituent groups of a larger organization. Commonly, the convention is an annual, biennial, or perhaps quadrennial meeting of an international, national, or large state organization that makes its decisions by assembling representatives from different areas or constituencies.

The organizations that meet in conventions usually have such high total numbers of members that the only hope for making decisions as a membership body is to assemble a representative group of members from local units or constituencies.

Assemblies of this type include conventions of political parties, professional and trade organizations, and fraternal lodges. They may bear names such as House of Delegates, Representative Assembly, Convocation, or General Assembly, as well as the most common name, Convention.

Serving as a Delegate

A convention can be a real test of endurance. You have to get up early, go to meetings, and eat rubbery chicken at the president's luncheon. And unless your convention-planning leadership has figured out how to make your meetings interesting, you may even have to endure hours of boring reports while seated on a stadium seat or on one of those meagerly-padded-but-soon-rock-hard institutional chairs, given respite only by the privileged motion to recess (see Chapter 10 in *Robert's Rules For Dummies*).

Your election or appointment as a convention delegate is based on the rules and qualifications for delegates as established in your organization's charter or bylaws. The organization holding the convention lays out details establishing the number of delegates from a constituent unit and the method of selection (including any

provisions for alternates). Specific procedures for selecting delegates at the local level may also be found in the local bylaws.



If you're a delegate, your duty is to represent your constituency in accordance with the rules of your organization. You're expected to attend the meetings of the convention. You're free to vote as you see fit on any matter to come before the convention unless you have been instructed by legitimate order of your constituent unit to represent their interest in a particular way.

Organizing the Convention Assembly

Even though the organization remains in place after the convention is over, the convention of delegates is only in existence for the term of the session. Its membership consists of the delegates sent by the local constituent units, and the delegates have to self-organize before they can address the real business of the organization.

To accomplish the basics of self-organization, a convention requires three essential committees (normally appointed by the organization's leadership well in advance of the convention) to do some advance work so that, as soon as the convention is called to order, the necessary decisions can be made to assure a successful session. The following list contains the three main questions that need to be answered and the committees responsible for making such decisions:

- ✓ **Who says you can vote?** Credentials Committee
- ✓ **What rules do we follow?** Committee on Standing Rules
- ✓ **What do we do, and when?** Convention Program Committee

Deciding who can vote: Credentials Committee

Before you ever get started with a convention of delegates, you have to know who has a right to vote. That determination is made by adopting a report of the *Credentials Committee* as the official roll (or list) of the voting delegates at the convention.

The Credentials Committee is charged with making sure the people permitted to vote are there by right. In a convention of delegates,

not just any member of the organization can vote. Only the delegates authorized by their constituent units have that right.

This committee's job is never really complete until the convention adjourns. Its duties include knowing who to expect before registration ever begins, registering the delegates and validating credentials when they arrive, and keeping up throughout the session with how many and which convention delegates are entitled to vote. The committee issues supplemental reports containing changes to the roll of voting members; these revisions are subject to adoption by the convention.

The Credentials Committee's work starts well in advance of the convention, and in many cases, an organization's paid staff, rather than regular members, takes care of many of the preliminaries. The appointed members of this committee may even include staff members in addition to members of the organization.

In advance of the convention, the committee

- ✔ Sends to the constituent units the necessary information concerning their selection of delegates. This information includes the forms necessary for the local unit to certify the delegates and alternates who are authorized to represent the unit at the convention. When the forms are received back from the constituent units, the Credentials Committee verifies the eligibility of each delegate as far as is necessary or required under the bylaws and other rules of the organization (see Chapter 2 in *Robert's Rules For Dummies*). If a delegate is deemed ineligible (perhaps because dues haven't been paid, or some other reason), then the committee must let the unit know and determine which alternate is to be admitted.
- ✔ Prepares the master list of who is entitled to register as a delegate and makes arrangements for actual registration of the delegates at the convention.

As the convention gets underway, the Credentials Committee

- ✔ Registers the delegates upon arrival and verifies that they're properly authorized to serve as delegates.
- ✔ Reports to the convention the roll of the then-registered delegates, with information as to their number and other statistics as may be customary or necessary to inform the body of its make-up.
- ✔ Makes supplemental reports, usually at the beginning of every meeting or meeting day in the session. These supplemental

reports present revisions in the roll of voting delegates and are accepted by way of a motion to adopt. However, in this case, even though the motion is technically amending something previously adopted, only a majority vote is required to adopt a revised credentials report. Unless the seating of one or more delegates is challenged, these reports are usually adopted by general consent.

Establishing some rules: Committee on Standing Rules

Because each convention is a unique assembly, you need to have some ground rules tailored especially for your convention. It's the job of the *Committee on Standing Rules* to propose these rules.

Defining convention standing rules

Convention standing rules are really a mixed bag; the delegates are free to adopt whatever rules they care to make for the convention, as long as those rules don't conflict with the bylaws. Some convention standing rules are, in every respect, *special rules of order*, and others are more like regular standing rules.

Special rules of order are rules that modify an organization's parliamentary authority. *Standing rules*, on the other hand, speak to matters of policy. An example special rule of order is a rule that limits debate to two speeches of three minutes each on each side of an issue. An example of a standing rule is a rule requiring all delegates to wear ID badges while on the convention floor.

But no matter what kind of rule they resemble, the important thing to remember is that the convention standing rules expire at the close of the convention. Over time, your organization may develop a set of convention standing rules that vary only slightly (if at all) from one convention to the next. But the rules still must be adopted at each convention because the assembly is a different group than the one that met before.

In Appendix B of *Robert's Rules For Dummies*, you can find an example of convention standing rules, in the form of a report of a convention Committee on Standing Rules.

Adopting convention standing rules

The job of developing convention standing rules is assigned to — yep, you guessed it — the Committee on Standing Rules. This committee's duty is to draft these basic rules under which the

convention will operate and present the proposed rules for adoption by the delegates right after they adopt the Credentials Committee's report.

The recommended procedure for bringing convention standing rules before the convention for adoption has two main steps:

1. Print and distribute the proposed rules to all delegates no later than the time they enter the meeting hall.
2. At the appropriate time, the reporting member of the committee reads the proposed rules in their entirety and then moves their adoption.

Voting to adopt convention standing rules

Although convention standing rules are offered as a single motion, they really are a number of separate questions, as many as there are rules on the list. But although it's not in order to consider them one-by-one, if any member wants to have a separate vote on any one of the rules, the demand must be met. If such a demand is made, the vote is taken first on all the other rules as a group, and then a vote is taken on the separated rule or rules.



A two-thirds vote is required to initially adopt the convention standing rules as a group, but any rule that's not of the nature of a special rule of order can be adopted individually by majority vote. However, convention standing rules are rarely controversial, and in most cases they can be adopted by unanimous consent (see Chapter 8 in *Robert's Rules For Dummies*).

Voting to rescind, amend, or suspend convention standing rules

If, during the convention, you want to change one of the adopted convention standing rules, a two-thirds vote (or the vote of a majority of all the delegates who have registered) is necessary to rescind or amend. A majority vote, however, is all that is required to suspend such a rule for a particular purpose if the suspension has the effect of reverting to a rule provided in the parliamentary authority. Otherwise, the suspension requires the same vote as to amend or rescind.

Knowing when to do what: Convention Program Committee

After you've decided who can vote and what the rules are, it's time to get down to the real business that the delegates have assembled to conduct.

Because conventions typically are burdened with a heavy workload that must be handled in a relatively short time, planning is critical for success. That's where the *Convention Program Committee* comes in.

Planning the program

The task of planning a convention's schedule of meeting times and events falls to the Convention Program Committee. But this task isn't as simple as it sounds.

A Convention Program Committee has the duty to provide not only a schedule for meetings, meals, entertainment, and the like, but also must do so while considering the membership's need to review its recent accomplishments and consider its plans for the future. The convention can't be all fun and games, after all.

The successful Convention Program Committee begins its work at the end of one convention and really never stops until a new committee takes over at the end of the next convention. The delegates, however, may only see the results of all this work in the schedule of events, including the order of business, which they're asked to adopt at the opening session of the convention.

Agreeing to the committee's program is usually quite critical to the success of the convention and, ultimately, to the success of the organization. For that reason, the Convention Program Committee should be selected with great care and deliberation, and past convention experience with the organization is always a plus.

Adopting the program

A tentative convention program may have been published well in advance of the convention to inform prospective delegates about the plans in the works. But such plans usually change as they become finalized.

On the day of the opening session, the program to be adopted should be distributed to the delegates. Any changes to this edition can be noted when the Convention Program Committee reports and moves the adoption of the program.

The Convention Program Committee reports immediately after the convention standing rules are adopted. The motion to adopt the program is debatable and amendable, and it requires a majority vote. Changes after adoption require a two-thirds vote or a majority of the entire membership. Most of the time, however, the convention program and later changes are adopted by unanimous consent (see Chapter 8 in *Robert's Rules For Dummies*) to save time.

Other Convention Committees

The Credentials Committee, Committee on Standing Rules, and Convention Program Committee are key to bringing the convention assembly into existence. But they're not the only committees necessary to produce the convention or to help process the business as your organization works through its agenda.

In addition to those three committees (and any other specialized functioning committees your own organization may constitute for your convention), Robert's Rules discusses two other committees that are common to nearly all conventions. They are the

- ✓ Convention Arrangements Committee
- ✓ Resolutions Committee

Getting down to details: Convention Arrangements Committee

The unsung heroes of a successful convention are the people who work behind the scenes in concert with the board and the executive staff to pull together all the details of the convention. These folks help make it an event to remember, and they're the members of the *Convention Arrangements Committee*.

This committee is usually a standing committee of the organization rather than a committee of the particular convention, and it often includes members with prior convention experience as well as members who are constituents of the local units where the convention is to be held.

The Convention Arrangements Committee often is appointed *with power* to contract with meeting planners or deal directly with hotels, meal functions, social functions, meeting facilities, speakers, entertainment, transportation services, or any of the many integral components necessary for a large group to comfortably accomplish its work.



If this committee isn't specifically empowered to act, the executive board is forced to give specific authorizations to contract in the name of the organization. This approach is often impractical, so you may also find that key members of your organization's paid staff often work in close association with the Convention Arrangements Committee in order to secure all the services necessary for the convention.

In addition to the basics mentioned earlier in this section, the Convention Arrangements Committee also sees to details such as:

- ✓ Arranging for hotel accommodations for guests
- ✓ Receiving visiting dignitaries at arrival
- ✓ Providing for all printed matter, including local maps and locations of meetings and events, and information about the attractions of the area
- ✓ Directing the seating arrangements, platform set-up, audio-visual equipment, and other details related to the meeting hall and staging areas
- ✓ Providing for communications needs, such as telephone services and radio communications
- ✓ Staffing an information desk and perhaps seeing to press releases in connection with the event

Screening proposals for action: Resolutions Committee

A convention usually has many essential objectives that must be met in a short time, so it becomes necessary to provide a means to screen any motions (except for those that come from other committees) that delegates may want to have considered by the group.

Members usually have the right in meetings to make main motions without notice, but in a convention of delegates, motion screening is necessary because of the sheer numbers of delegates and program time constraints. The convention rules or bylaws should provide for the handling of main motions through automatic referral to the *Resolutions Committee*.

Defining the procedures for handling motions and resolutions

The timing and frequency of the Resolutions Committee's reports depends on the number of sessions and the times or opportunities available for members to submit main motions to come before the convention.

Whether a main motion is made as a formal resolution (being a *form* of main motion) or simply as a main motion without any particular formality, the usual and proper use of the Resolutions Committee is to have all main motions referred to it for review and recommendation. (See Chapter 6 in *Robert's Rules For Dummies* for more information on main motions.)

If you have properly defined your Resolutions Committee in the bylaws and established good rules for its use, its primary purpose is to review all main motions (except for those proposed by a committee) before they're placed before the membership for consideration.

A Resolutions Committee can be authorized to put motions and resolutions in the proper form to assure that it really proposes what the mover intends. Sometimes the committee needs to deal with multiple motions on the same subject and can be authorized to offer a single motion to avoid duplication. The committee is often authorized to discuss and consider the merits of the motion and report its recommendations to the convention.

Establishing the role of the Resolutions Committee in your organization

The role and authority of a Resolutions Committee can vary from one organization to another, and much depends on the organization's needs and customs.



A Resolutions Committee, for obvious reasons, generally shouldn't be empowered to keep a motion or resolution from being considered unless it's clearly dilatory or improper. I've seen enough problems created by a well-intended Resolutions Committee that's perceived to be using its power to silence members with whom committee members disagree or just don't like. Your committee can be empowered to hold things from consideration, but it rarely bodes well for a select few to be able to keep a motion off the floor no matter how the members of the committee may feel about the idea. Be judicious in your rules for Resolutions Committees regarding what and how they must report, and make provisions for the membership to require them to report a resolution, even without a recommendation, even if the committee would otherwise not be so inclined.

Acting on a Resolutions Committee report

When a Resolutions Committee reports, the chair should handle the motions independently of the committee's recommendation.

For example, when the committee reports a member's proposal that the dues be increased, it may recommend unfavorably. The chair shouldn't offer the motion to "adopt the committee's recommendation," but rather should offer the motion itself: "The Resolutions Committee reports the motion of Mr. Money to raise the dues by \$10 per year, and recommends it be rejected. The committee's recommendation notwithstanding, the question is on the adoption of the motion to increase the dues. All those in favor of increasing the dues will say 'Aye.' Opposed, say 'No.'"