

Robert's Rules For Dummies

Bonus Chapter

Starting a New Association: The Steps to Success

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In This Chapter

- ▶ Understanding how new organizations are formed
 - ▶ Managing productive organizational meetings
 - ▶ Staffing a committee to draft bylaws
 - ▶ Enrolling charter members
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Sooner or later, you'll find a cause that needs the collective effort of a group of people with the same or similar objectives. If you're someone who sees what needs to be done and sets out to do it, then you're inevitably one of the key players. You're instrumental in getting things moving to accomplish the mutual goals of the group. In short, if you're not destined to be *the* leader, you're certainly a power behind the throne.

Starting a new organization isn't terribly difficult, but it shouldn't be undertaken unless you're committed to spending a good bit of time making it happen. Like anything else covered in this book, starting a new organization is all about procedure. It can get technical, but it's procedure nevertheless. That's not to say you can succeed without a sense of community, mind you — but you can't get *that* out of any book.

After you have a cause and have gathered others who share your vision, follow these steps to create your new association:

1. Decide to organize, and prepare for an organizational meeting.

2. Invite prospective members.
3. Hold the first organizational meeting, during which you:
 - Elect temporary officers.
 - Adopt a resolution to form a new organization.
 - Appoint a committee to draw up bylaws.
4. Draw up your bylaws.
5. Hold a second organizational meeting to approve the bylaws.
6. Enroll members.
7. Hold your charter meeting, and elect permanent officers.



The organizational meetings leading up to the creation of a new association are representative of a particular form of deliberative assembly (see Chapter 3 in *Robert's Rules For Dummies*) known as a *mass meeting*. A mass meeting is a meeting of an unorganized body of people with a common goal. This chapter describes a mass meeting of people with a goal of forming a new association. But a mass meeting may just as easily be called to start a petition drive to oust your mayor or to organize a one-time event such as a “support lower taxes” rally. In a mass meeting, the membership is always anybody who attends who is in sympathy with the common goal, and no matter how many people show up, you’ve got a quorum. A group’s *mass meeting* status ends when it achieves its goal. In this chapter, the mass meeting status ends when the new organization adopts bylaws and members officially join the new association.

Preparing for an Organizational Meeting

No doubt your heart wouldn’t break if you never had to attend another meeting, but here you are getting ready to start a new organization — a new group that adds another monthly meeting to your already busy agenda. But you’re dedicated, right?

When you and your friends get together to plan your first organizational meeting, you need to make some decisions:

- ✓ Where and when will the meeting be held?
- ✓ How will you publicize the meeting?

- ✔ Who will chair the meeting?
- ✔ Who will start the meeting and nominate the chairman?
- ✔ Who will nominate someone to take minutes? And who will that minutes-taker be?
- ✔ Will you adopt Robert's Rules as the authority for the meeting?
- ✔ Who will make the presentation to the attendees about why you've called the meeting?
- ✔ Who will propose a motion to organize a formal association?

If prearranging things makes your meeting sound like a put-up deal, well, it sort of is. You don't have an association yet. You're just a host in a room full of guests. Read on for an explanation.

Inviting Prospective Members

After you've decided when and where your first organizational meeting will be held, you have to inform the folks you want to attend, who you think will be interested and in agreement with your goal.

The best way to get the word out is to prepare a written notice and distribute it to the people you want to come to the meeting. The following is a notice for a neighborhood meeting to get folks together to form a neighborhood civic association:

Notice of Meeting

There will be a meeting of Elm Acres homeowners who are interested in forming a neighborhood civic association. The meeting will be held at the Oak Tree Branch of the Public Library at 7 p.m. on Monday, March 4. If you're interested in forming an association to benefit our community, then you're invited to attend.



The first organizational meeting is a meeting to form a new association instead of a meeting of an existing group; so, the only rules you have to follow are the ones you make up. It's your meeting, and you control the hall. You get to say who can attend, and you don't have to invite or put up with anybody who doesn't agree with you on the basic goal to form a new association.

Until you have bylaws and permanent officers, whoever pays the rent for the meeting room is in charge and can remove anyone who puts up too much fuss. (But don't abuse your power. You can't have a group if no one wants to join with you!)

Holding the First Organizational Meeting

You read that heading correctly — it's just the first. You'll have another meeting before you wind up with your new organization. Remember that this is all a process. Meetings are necessary for making group decisions, and as great as the Internet is, it's still no substitute for getting together at the same time in the same room and hashing things out.

In this section, I run through the tasks you need to accomplish in your first organizational meeting; after you've finished with all this, you can move on to the next step in creating a new group.

Electing temporary officers

After you've called the meeting to order and given a brief talk about the purpose of the meeting, you should offer the responsibility for chairing your meeting to an individual elected by those in attendance. (Flip to Chapter 14 in *Robert's Rules For Dummies* for details on how to conduct an election.) (If you've been the moving force so far in pulling things together, then expect to receive the chair position.) The person elected as chair is known as the *chairman pro-tem* of this organizing assembly. After you elect the chairman pro-tem, the next order of business is to elect somebody to take minutes. (See Chapter 17 in *Robert's Rules For Dummies* for more info on minutes.)

These temporary officers serve only until the election of permanent officers takes place (which occurs only after you write and adopt your bylaws). (Don't worry, you don't write or adopt any bylaws tonight!) Anyway, your chairman pro-tem presides at all meetings of the organizing association, and the secretary pro-tem records all the proceedings.



For this kind of meeting, getting some kind of attendance record is a good idea, but it's not a requirement. If all the folks present can comfortably sit around a table, the secretary can easily make note of who's there. Otherwise, set up or pass around a sign-in sheet to collect names and contact information from the attendees.

Adopting the resolution to form the association

After you get the organizational meeting underway, your next goal is to get agreement on the idea that you need an association for whatever reasons you've determined. Have someone lined up to give a short talk about the reasons behind the call to form an association. After explaining the whys and wherefores, you can expect the group to ask questions and offer opinions.



Your presiding officer should brush up on how to assign the floor and how to keep some Longwinded Joe from holding forth after every other speaker takes a turn. I cover these issues in Chapter 7 in *Robert's Rules For Dummies*.

When the time is right and the sense of the meeting is clearly on track to form an association, one of the sponsors should seek recognition to offer a motion on the adoption of a resolution to form a permanent association.

If you've planned things well, you'll have a resolution ready and one of your friends on stand-by to make the motion when the time is right. Here's how the Elm Acres gang would go about it:

Prepared member: I think that we're hearing a lot of good ideas, and that it's a good time to get this show on the road, so, I move that the following resolution be adopted by this group:

Resolved, that it is the sense of this meeting that a neighborhood civic association be formed.

The chairman's job is easy at this point — it's a matter of handling a motion, and I cover the eight steps for handling a motion in Chapter 6 in *Robert's Rules For Dummies*.

After the resolution to form a permanent association is adopted, you're on your way to the next step: defining the proposed organization by coming up with a set of bylaws for consideration by your group.

Appointing a committee to draft bylaws

In Chapter 2 in *Robert's Rules For Dummies*, I explain why you need bylaws and how important they are to your organization. You don't really have an organization until you define it by adopting bylaws. And producing the right bylaws for your unique group requires a good deal of focus.

So when you reach the point in your organizational meeting in which everyone has agreed to form an association (jump back to the previous section for an explanation), the time has come to authorize and appoint a committee to put together a set of bylaws for your organizing group to consider and adopt.

This committee does some very important work that has far-reaching effects. So, your committee volunteers need to commit to several regular meetings because the job could take a while.



A parliamentarian is a valuable consultant at this stage of the organizational process. You can save yourself and every member of the Bylaws Committee countless hours by getting some professional assistance for this part of the process.



If you want to make the best decision when selecting members of your Bylaws Committee, then include on the committee all your best thinkers and writers. And just as importantly, make sure you include anybody who will probably have a lot to say about all the rules and details that go in bylaws. Get those people to the committee meetings and put them to work. Otherwise, they'll wear you out at the meeting in which the bylaws are up for official adoption. Agreeing to build a new organization is one thing; quite another is agreeing on all the details of how the group should operate.

Taking into account the ideas and concerns of anybody interested at the committee level can actually help you develop a good set of bylaws that doesn't tie your hands at inappropriate times or leave you open to the whims of bothersome members after you nail things down.

Preparing to go home (at least for now)

You may think your organizational meeting is over, but you've got a little housekeeping to take care of at this point. Put these four tasks on your checklist and deal with them in the order listed.

1. **Set your next meeting.** Decide on a time and place to reconvene and hear the report of the Bylaws Committee, or just plan to adjourn to meet again at the call of the chair. Make sure that your Bylaws Committee organizes quickly and develops a schedule that affords a report at a reasonable date, although their schedule shouldn't compromise the bylaws because of a mistaken notion that this should be a hurried job.
2. **Authorize the Bylaws Committee to provide copies of their report with expenses to be reimbursed.** Somebody just needs to make a motion to authorize reimbursement of copy expenses.



If your great idea to create this new organization crashes and burns, the folks in the room should be prepared to cover reimbursement of the copy expenses. You don't want to leave a few of your friends holding only a copy-shop receipt for all their trouble.

3. **Take some time to discuss your aims and purposes.** Your Bylaws Committee needs guidance to know what direction the membership prefers to take with the association. In neighborhood civic associations, for example, these discussions center around knowing some of the specific needs of the individual association, in order that the size of the board, its authority, the nature of standing committees, and so on may be assessed generally. However, you don't want to go into too much at this stage of the game. You're much better off saving discussion of details for the committee.
4. **Adjourn to a new time or to meet again on the call of the chair.** Everybody likes to adjourn. It's usually the favorite part of meetings. But adjourning has rules too. I cover them in Chapter 10 of *Robert's Rules For Dummies*.

Drawing Up Your Bylaws

As you can read in Chapter 2 of *Robert's Rules For Dummies*, your bylaws are the rules you make for and about your own unique organization. They define how the organization operates, and properly constructed, they protect the rights of absentees and minorities of various sizes, even down to a minority of one. Bylaws that are too easily amended (or are amendable despite the opposition of a large minority of more than one-third) are an invitation to trouble. At worst, they can be the cause of an organization's dissolution or perhaps a split and takeover of a large treasury by an unrepresentative group. The most important investment of time and effort for a newly forming organization lies in the careful consideration of its bylaws.

Getting down to bylaw business

In your first Bylaws Committee meeting, you have one main objective: Talk about how you want the organization to run.

Locate examples of bylaws for organizations of the same nature as the one you're forming and read them. Then spend some quality time talking as a group about how you want your organization to operate.

In this meeting, you need to talk about things like how often you want all the members to meet to make decisions, and whether you want to have a board that does most of the work. You need to discuss the things you want the group to accomplish so that you have some idea of what kind of committees to set up. Keep in mind that ambitious projects cost money. So, for example, setting up a Security Patrol Committee is unnecessary if you can't gather enough money to cover a related cost.

Appointing a subcommittee to write the first draft

At the Bylaws Committee meeting, you need to appoint a member or two to prepare a first draft of bylaws, with the general provisions reflecting the general sense of the discussions you've had (see the previous section). For good measure, have these members read Chapter 2 of *Robert's Rules For Dummies*, too, so that they're more familiar with the ins and outs of bylaws. And if I haven't said

it enough already, you can't go wrong by involving a parliamentarian in this critical work. A professional parliamentarian can help you include in your bylaws all the points you need to address and at the same time ensure that you avoid ambiguous provisions that can cause serious problems down the road.

Reviewing the subcommittee's first draft

After the drafters have pulled together a document, the full Bylaws Committee gets back together and tackles its real work. Take your time! Pay close attention to every detail of the drafted bylaws as your committee goes through the document and prepares to nail things down for the full membership to bring the organization into existence.

You're a committee, and this first draft is just a starting point. Look at each provision closely and critically. Consider the long-term, and think about how things will work the way you have them. Work through each article and section individually, and examine each as if it were unchangeable. Right now, you can change things to your heart's content. (And don't forget to refer to Chapter 2 in *Robert's Rules For Dummies* often!)



Keep reviewing the bylaws until you're satisfied that you've set up an organization that will work. The important thing is to take your time and get it right.

When you have a set of bylaws your committee is satisfied with, you're ready to report to the organizing membership. Call your chairman pro-tem and let him know you're ready so he can schedule the second organizational meeting.

Holding Your Second Organizational Meeting

The big day has arrived. Your committee to draft a set of bylaws has it all figured out. Everybody who's anybody has weighed in with the committee, and it's time to make your new organization a reality.

Calling the meeting

Your temporary chairman's duty is to notify everybody who attended the first organizational meeting and let them know that the Bylaws Committee is ready to report. The secretary pro-tem is responsible for sending the notice because the list of attendees should be on record in the secretary's file. Even though you want a big turnout, you don't have to worry about how many people show up. Because you're conducting what Robert's Rules calls a *mass meeting* (see Chapter 3 in *Robert's Rules For Dummies*), you technically don't have a membership yet. The only members you have are those who are in favor of the original goal and who show up for the meeting. So, the *quorum* (see Chapter 4 in *Robert's Rules For Dummies*) in this kind of meeting is the number of people who actually show up.

Approving the minutes

Just as in any other meeting, after your second organizational meeting is called to order, the first thing to get out of the way is the reading and approval of the minutes. Flip back to Chapter 5 in *Robert's Rules For Dummies* for more detailed instructions on this step.

Adopting the bylaws

When you're adopting initial bylaws for a new organization, you proceed by paragraph, or *seriatim*. You read the bylaws article by article, discuss each one, and make any changes article-by-article and section-by-section. When you get through the whole document, you decide whether you want to go with it or not.

If you don't like your committee's draft and you can't figure out how to amend things to your satisfaction in this meeting, you should send the document back to the Bylaws Committee for more adjustment and meet again when the committee has a new proposal.

If, on the other hand, you've worked out any problems and nailed down any details the committee missed, then you're ready for the final vote on adoption of the bylaws. Because these are new bylaws of a brand-new organization, it only takes a majority vote to adopt them.



This vote is pretty significant because as soon as you adopt bylaws, you have a brand-new, shiny, out-of-the-box organization, and the bylaws are in effect immediately upon their adoption. No changes now without previous notice and a two-thirds vote!

Holding Your Charter Meeting

For all but the smallest organizations in which everybody who is going to enroll does so at the second organizational meeting, your next step is to conduct a third meeting known as a *charter meeting*.

The charter meeting is actually the first official business meeting of the new organization.

Enrolling charter members

Just for the sake of encouraging you to think in terms of success, I'm assuming that you adopted the bylaws. If so, you're almost home.

If you constructed your bylaws correctly, you've specified dues amounts and defined member eligibility. Your new organization doesn't have any members, though, until you enroll them by collecting dues and obtaining from each member a written agreement to abide by the new bylaws.

So, after you've adopted bylaws, the remaining task is to officially enroll members in your new organization.



Because from the moment you adopt bylaws you need to be an enrolled member to vote on anything, your new organization stands in immediate recess to enroll members.

You can't enroll new members without enrollment agreement forms containing a statement that the undersigned agrees to abide by the bylaws. Signing an enrollment form becomes a commitment to pay the dues and any initiation fee.

The recess to enroll members may only last a few minutes if everybody planning to join is at the meeting. If not, you can adjourn to meet again in a third and final meeting, and take a day or two (or more) to distribute bylaws and enrollment agreements. During this longer recess, you can specify some particular date for the charter meeting, in which all the newly enrolled members have the right to vote on the election of permanent officers.

Electing permanent officers

After completing the enrollment of charter members, you have an organization — finally! The next thing to do is elect your permanent officers according to the details outlined in your bylaws. Your temporary chairman presides over this meeting until you have a permanent president. For information on how to nominate and elect your officers, look to Chapters 13 and 14 in *Robert's Rules For Dummies*.

Handling any other essential business

The countdown is on to adjournment of your new association's organizational session. But before you adjourn, you may have some final details to address. Maybe you just need to fix the time for the next meeting (the day should be in your bylaws). But you may have other, more important things to wrap up. For example, the new president may have the duty to appoint committees and may have already made some decisions. Now's the time to address these details.

Adjourning

After all the work is finished, it's in order to adjourn the meeting. Future meetings are held in accordance with your bylaws. The end of this process is the beginning of your new organization. Congratulations are in order — you've just started a new organization. Now get ready because the real work is ahead of you!