The New Credentialing Process

A Status Report
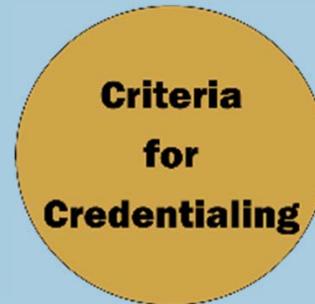
Members of the NAP Commission on Credentialing

Thomas (Burke) Balch PRP, Chair
Gail Knapp PRP, Vice Chair
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Part One: Overview

Thomas (Burke) Balch PRP
Chair, NAP Commission on Credentialing

The Commission's First Year

The first meeting to become organized was in person after the 2015 Convention.

Meetings were held regularly on Adobe Connect throughout the Fall to agree on philosophical issues and to agree on basic definitions.

- Distinctions between the meaning of RP and PRP.
- The future creation of a new Expert Parliamentarian (EP) credential was discussed.
- Skills required for the RP and PRP were identified.
- The kinds of testing required to renew a credential and to obtain that credential were discussed.

The Commission's First Year (cont.)

- The Commission appointed a drafting committee to assist with the creation of the standards and actual assessment materials that will be used.
  - Members of the Commission who agreed became members of the drafting committee.
  - In addition, James Stewart PRP and Steve Glanstein PRP were appointed to the drafting committee.

- Receiving a grant from the NAP Educational Foundation, the Commission and Drafting Committee met for three days in Las Vegas in April to receive training from the Worldwide Instructional Design System and to begin creating the new credentialing process.

The Commission's First Year (cont.)

- The overall process was created and the Preliminary Report was written.
  - The Commission established a "grandfathering" process for those who currently have a credential.
  - The actual study material for the RP and PRP was identified.

- The details of the RP process were determined and samples of the actual testing materials to be used were created.

The Commission's First Year (cont.)

The drafting committee and the Commission continued to meet on Adobe Connect throughout the Spring and Summer to finalize the information for this presentation. The Commission wishes to thank former NAP President, Ann Guiberson PRP, for formatting the Preliminary Edition of the *Criteria for Credentialing*.

What happens during the transition from the existing system to the new one:

- ✓ **Current RPs and PRPs**
- ✓ **Candidates in process of obtaining RP or PRP credentials**
- ✓ **After the Grandfathering period is over**

What remains the same

For Current PRPs & RPs:

- **No requirement to go through new process to *retain* RP/PRP status for anyone with that status on the date the new process is implemented.**

- **The current process for *retaining* RP/PRP status remains the same for "grandfathered" RPs & PRPs.**

For those in transition - RPs

RPs will be "grandfathered" if they already have earned the credential:

There will be an approximately 2 year grace period *after* the implementation date to attain PRP under current process.

(Exact period to be announced when the implementation date is announced.)

After the grace period

- **In order to be qualified to attain PRP thereafter, a grandfathered RP will be required to first go through the new process to attain an RP, then the new process for PRP.**

- **A grandfathered RP who fails to complete the new process for attaining RP *will not lose RP status* as long as s/he continues to fulfill requirements for renewal.**

- **However, s/he can't go on to earn the PRP until successfully completing the new RP process.**

Those in transition who have not completed the RP

Members in process of attaining RP on implementation date:

If member has completed *two or more* parts of then-current registration exam (other than the open book part), may attain RP status by completing then-current registration exam in accordance with time limits then in effect.

Members in process of attaining a PRP on the implementation date are covered by an approximately 2 year grace period since they already have the RP credential.

Expectations of RPs and PRPs under the new credentialing system

✓ **Differences between RP and PRP**

✓ **New testing criteria and processes**
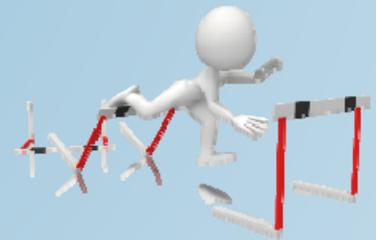
Old vs. New expectations of RPs and PRPs in testing

Currently our assessments emphasize:

- **For the RP: We test book knowledge. However, we expect RPs to be able to offer parliamentary services to clients.**

- **For the PRP: We test skills and knowledge in simulations that mimic the actual situations in which parliamentarians work.**

- **The Commission believes that while some memorized information is essential, all credentialed members should also have demonstrated performance based skills appropriate for their level of certification.**

New requirements for RP and PRP

Both the RP and PRP are expected to demonstrate qualifications to serve as a parliamentarian for organizations:

RP:

- Most ordinary meetings under usual circumstances
- Commonly needed parliamentary advice to ordinary organizations

PRP:

- Meetings dealing with less common or more complex parliamentary issues
- Expert parliamentary advice to organizations dealing with unusual or complex issues

New Expert Parliamentarian - EP:

- To be created in the future
- Specialties such as professional presiding, teaching, expert witness, or the like

Categories of knowledge and skill

- **What should the parliamentarian be able to know and apply during a meeting without having to consult *RONR*?**

- **What should the parliamentarian be able to rapidly look up in *RONR* and apply during a meeting?**

- **What should a parliamentarian be able to do outside a meeting while consulting *RONR*?**

- **Different levels for RPs (ordinary meetings, commonly needed outside-of-meeting advice) and PRPs (more complex meetings, unusual outside-of-meeting advice)**

Standards for RPs and PRPs

- **Based on the *Body of Knowledge* developed by the Special Committee on Education and Credentialing**

- **Highly specific references to page and line numbers in *RONR* and other sources**

- **Clear distinction between those standards whose rules the candidate will be expected to be able to know and apply without consulting the source, and those the candidate will be expected to be able to apply while consulting the source**

The New Assessment Process

There will be <u>three steps</u> for each candidate to complete before earning the credential.

1. Step One – Online or paper test predominately of knowledge

2. Step Two– Assessment predominately of application: may include both online/paper tests and written assignments

3. Step Three – Simulation in person or, possibly, in a simultaneous online forum

Each step must be successfully completed before moving on to the next step.

Will the new process be easier or harder than the current one?

ANSWER: YES!

How will it be easier?

1. Instead of some theoretical ideal of comprehensive knowledge and ability, assessment will be focused on what parliamentarians in fact need to know to serve clients competently.

2. By providing multiple explicit, detailed, "granular" standards, separately for RP and PRP, the *Criteria for Credentialing* document narrowly and specifically identifies what candidates need to know and be able to apply.

How will it be easier? (cont.)

3. As will be illustrated by the next speaker, candidates will know in advance in precise detail how their knowledge and skill will be assessed in each part of each step.

4. For Steps One and Two: the assessment process is broken up into manageable units so the candidate can study, master, and be assessed on them one at a time.

How will it be easier? (cont.)

5. For Step Three: the candidate will be expected to bring together much of that knowledge and skill in a simulation(s) designed to be as realistic as feasible in paralleling what parliamentarians are actually expected to do for clients.

6. To the extent feasible, candidates will be given multiple opportunities to re-attempt units not initially successfully completed.

How will the new process be more challenging?

A. In its emphasis on real world parliamentary activities, Commission is setting a standard of realistic competence so that clients may rightfully expect that one credentialed by NAP is indeed capable of appropriately serving them.

B. To ensure mastery of the required competencies, process is more extensive and, for most, will be a longer, step-by-step journey.

C. Simply knowing rules will not be sufficient; candidates will be expected to be able to apply them accurately and helpfully for clients.

Where the Commission stands

Churchill

WHAT WE HAVE DONE

- **Devoted considerable attention to analyzing and deciding upon the basic competencies that should differentiate RPs and PRPs**

- **In multiple drafts, honed the exact detailed standards to be separately applicable to RPs and PRPs**

- **Made key decisions about grandfathering, transition, and sequence**

- **Obtained training in psychometric techniques to fulfill duty imposed by bylaws**

- **Established the template to be followed in setting forth performance assessment tasks, and the 3-step sequence for them**

The Commission's Future Plan

- Develop and adopt performance assessment tasks for RP.

- Prepare sample and actual examinations and assignments for the RP performance assessment tasks.

- Arrange for online examinations if feasible.

- Recruit and train those who will administer and evaluate the RP performance assessment tasks.

The Commission's Future Plan (cont.)

- Set an effective date for the new RP performance assessment tasks and implement the new RP performance assessment tasks.

- *WHEN THE ABOVE ARE DONE,* turn to doing the same for PRP.

- Create renewal standards and procedures for RPs (and then PRPs) initially credentialed under the new system.

The Commission's Future Plan (cont.)

- **Designate the timeline for grandfathering and the process for renewal of existing credentials.**

- **IN THE FUTURE: Investigate the EP credential.**

Proposed Timeline

At its last Adobe Connect meeting, the Commission passed the following resolution:

Resolved,

1. That the current credentialing process for Registered and Professional Registered Parliamentarians will be maintained through calendar year 2017;

2. That it is the objective and current intent of the Commission on Credentialing to implement the new credentialing process for Registered Parliamentarians during calendar year 2018; and

3. That it is the objective and current intent of the Commission on Credentialing to announce at or in conjunction with the NAP 2017 convention the dates and procedures for implementing the new credentialing process for Registered Parliamentarians.

Part Two:
An example of what the new Performance Assessment Tasks will look like

Gail Knapp PRP
Vice-Chair, NAP Commission on Credentialing

A word about terminology

- **Assessment:** A test to determine whether the candidate has the required knowledge or skill.

- **Competency:** A broad basic skill. Candidates must show proficiency in all competencies identified for each credential in order to obtain that credential.

- **Objectives:** Pieces of each competency. Objectives show all the steps to acquiring the competency or all the skills required to accomplish that competency.

- **Performance Assessment Tasks:** The actual test used to measure whether the candidate has achieved the relevant competencies.

- **Performance Expectations:** Identification of the relevant written material from *RONR* or other identified source where the particular information about that particular skill is described.

Why do PATs?

- Only being able to answer multiple choice questions does not indicate actual skill serving as a parliamentarian.

- There are some things that a parliamentarian should have learned so thoroughly that using references to find answers to questions should not be required.

- But, there are other questions that concern topics that are less frequently needed. An ethical parliamentarian will not trust his/her memory, but will check with references before answering those questions.

Why do PATs? (cont.)

Memorization of *RONR* is not the same thing as having useful skills as a parliamentarian. It is important to have good skills of analysis and identification of problems and solutions as well as some writing and analysis skills.

Some skills, like the research section of the RP exam, have become outdated with new technology.

Why do PATs? (cont.)

- We assume that the PRP will continue to have the skills and knowledge of an RP. So PRP testing will include skills identified as those of an RP.

Why add the steps to the process?

- Starting with easier material and moving to more challenging testing is logical.

- The testing is divided into smaller stages rather than a stress-producing marathon. Since the candidate will need to pass each part before moving on to the next step, the emphasis will be on success rather than on failure.

- Dividing the material into small, identifiable pieces makes the study process more productive.

Why add the steps to the process? (cont.)

- **The *Standards* provide information about exactly what text needs to be mastered for each Step. They are color coded with exact pages and line numbers.**

- **Candidates who have deficiencies in specific skills can be identified and given opportunities to gain those skills they are lacking before being retested.**

Why add the steps to the process? (cont.)

Material in RONR that is only needed under very unusual circumstances are not included in the testing. The Commission assumes that individuals who are skilled at using reference material can access that material when and if needed.

What is contained in each step?
Step One

Step One concentrates on objective testing of basic information and can be completed online using existing software.
  - **This Step will consist mostly of multiple choice, short answer and true/false questions.**
  - **True/False questions will require that answers identified as false be corrected.**
  - **Short answer questions will be written so that only one answer is a reasonable response.**
  - **While the actual questions will not be provided before the test, the candidate will be given examples of questions and will be told exactly the number and type of questions and how they will be evaluated.**

Step Two 2

Step Two mostly involves using information at home with reference material available. These tests will be similar to the "assignments" that have traditionally been given to PQC candidates to complete before and after the in-person event.

- Such skills as script writing; bylaws writing and interpretation; and analysis will be emphasized.
- These tests may be available online, but typically will require that the candidate complete "essays" of some type with full use of resource materials.
- Again, while the actual test questions will not be provided before the test, the candidate will know exactly what skills will be tested; what pages and lines in reference materials need to be used; and how the test will be evaluated.

Step Three 3

- **Step Three ensures that the candidates can apply everything they know to simulations of real life experiences.**

- **While the possibility of discovering an online option is still being decided, this Step will probably require an in-person evaluation.**

- **There will be scenarios created where the candidates will function as professional parliamentarians expected to give advice to the chair while identifying problem areas and answering pre-determined questions from the chair.**

Step Three (cont.) 3

- The use of reference materials will be acceptable when the issue is something where a typical parliamentarian might need that help. However, it is expected that for simple situations, the candidate will not require references.

- Just as in Steps One and Two, all the required study material is identified in the *Standards*. And the candidate will be given specific instructions before the test about what will happen during the test and how it will be evaluated.

An example of Step One for the content area: Using Motions Correctly

- **The test will be conducted online or on paper for Step One. Step Two will be completed either on paper or online, and Step Three will likely be conducted in person.**

- **The candidate will be given instructions and an overview of exactly what kinds of questions will be asked and how their answers will be evaluated. This document, called "Performance Assessment Task for Step One Using Motions Correctly," will be provided in advance.**

- **There will be another document created for the person administering the test that will include the actual questions and the actual criteria for awarding points.**

- **When the new credentialing process is implemented, there will be a set of these documents for each step that includes all the categories being tested.**

Example Document Material

- **There is a document provided in the NAP Training Conference Guidebook that shows the kind of documents that will be created when the new process is implemented. Please note that this is only an example. The actual material has not yet been adopted by the Commission.**

- **This example shows a part of the Performance Assessment Tasks for each candidate for the RP.**

- **These are possible assessments of Using Motions Correctly. (*The actual tests will include much more material and a wide variety of questions. This example uses only a small number of them.*)**

- **Remember that it is the Competencies that are being tested. The *Standards for RP* and *The Standards for PRP* documents show the details of the material that should be mastered before taking each Step of the assessments.**

Contents of PATs

Each Performance Assessment Task (PAT) will be given to all candidates before taking the assessment and will have the following parts:

- ➤ Description of the assessment
- ➤ Competencies that will be tested
- ➤ The performance expectations
- ➤ Directions to candidate
- ➤ Rating scale/Scoring guide/Grading information

There will also be a "Directions to Evaluator" document that will NOT be given to the candidate.

Example: Performance Assessment Task on Using Motions Correctly

We will now look at one example of the kind of testing that will happen during a Performance Assessment Task.

The actual tasks for the RP will be created by the Commission during the next year.

Step One Example:

1

Description of Assessment
This is a knowledge based assessment where you will demonstrate that you know the basic motions and how they are correctly used in a meeting.

Competencies Tested with Performance Standards
Use main, subsidiary, privileged, incidental motions and motions that bring a question again before the assembly.

Example of Directions:

1

Performance Standards candidate should have read before attempting this assessment:
Thoroughly read and study all items with a Blue Step One indication in the Guide for Motions in General, Main Motion, Subsidiary and Privileged Motions and Incidental Motions.

Directions to Candidate:
You will be given an objective exam either online or on paper. You will not be permitted to use any references for this assessment. There will be ten (10) questions about motions. For each one, you will indicate whether the statement is correct (true) or incorrect (false). If it is false, you will need to write a correction that will make the statement true.

Scoring Sample False Questions

The candidate must first identify whether the statement is true (correct) or false (incorrect). One point is awarded if the answer is right. If the statement is false, the candidate must correct it or explain why it is false to earn a second point. The following examples would each earn two points.

Question 1. When the assembly is considering an amendment to the main motion, it is not in order to move to refer the main motion to a committee.
Answer: False- It is in order since the motion to commit has a higher precedence than the motion to amend.
Question 2. The assembly is considering a motion to Lay on the Table and the chair asks if there is any debate.
Answer: False- Lay on the Table is not debatable.
Question 3. A member wishes to "kill" a particular motion. She moves to Lay on the Table.
Answer: False- This motion is not used for this purpose. The proper motion is to Postpone Indefinitely.

Example of rating scale and scoring: 1

Rating Scale:

- **You will earn full credit for correctly determining that a true statement is true = 2 points.**
- **You will earn no credit if you indicate that true statement is false = 0 points**
- **You will earn the full 2 points for correctly indicating that the false statement is incorrect and correcting it properly.**
- **You will earn half credit = 1 point for correctly indicating that the false statement is incorrect but not making the appropriate correction.**

Scoring Guide:

Total score: _____

Required score to pass: _____

Item	Correct	Points	Explanation if correct
1.	YES NO	0 1 2	
2.	YES NO	0 1 2	
3.	YES NO	0 1 2	
4.	YES NO	0 1 2	
5.	YES NO	0 1 2	
6.	YES NO	0 1 2	
7.	YES NO	0 1 2	
8.	YES NO	0 1 2	
9.	YES NO	0 1 2	
10	YES NO	0 1 2	

Step Two Example:

2

Description of Assessment
The candidate will be given a scenario that is a script of a meeting. There are TEN motions mentioned in this script. You will need to find each motion and indicate if it was used correctly. If not, you will need to provide an alternate script with the correct motion or the correct usage. You may not use references during this assessment.

Competencies Tested with Performance Standards
Use main, subsidiary, privileged, incidental motions and motions that bring a question again before the assembly.

Example of Directions:

Directions to Candidate:
You will need to read the script provided carefully. Assume you are the parliamentarian for this particular chairman. Indicate when you would interrupt him because s/he is making an error and explain what s/he should have said. When reading the scenario concentrate only on the motions. There may be gaps in the dialogue not related to the motions being tested. Assume that they have been done correctly.

Example of Directions (cont.):

Rating Scale:
Each of the criteria will be evaluated using a Likert Scale:

Points	Standard
0	Motion misidentified as wrong or missed error
1	Error found but not corrected
2	Error found but major mistake made in correction
3	Adequate. Answer is correct.
4	Excellent answer includes alternative language.

Example of part of a scenario that could be used:

The Visiting Society is holding their regular monthly meeting. You are the parliamentarian. The president has just asked for the report of the Travel Committee that was given the task of investigating possible trips for next year. The Travel Committee chairman, John, ends his report with the following motion:

John: "By direction of the travel committee I move that the Society take a trip to Hawaii next May and stay at the Hilton Hotel on Maui with the cost for each member covered by the Society."

Mary: "It is moved that the Society make a trip to Hawaii next May and stay at the Hilton hotel on Maui with the cost for each member covered by the Society" Since this motion comes from a committee of five people, a second is not required. Are you ready for the question? The chair recognizes member Susan."

Susan: "I move to amend by inserting, "at a cost not to exceed $5000 per member at the end of the motion."

Example of part of a scenario that could be used:

The Visiting Society is holding their regular monthly meeting. You are the parliamentarian. The president has just asked for the report of the Travel Committee that was given the task of investigating possible trips for next year. The Travel Committee chairman, John, ends his report with the following motion:

John: "By direction of the travel committee, I move that the Society take a trip to Hawaii next May and stay at the Hilton Hotel on Maui with the cost for each member covered by the Society." *(No corrections required. Motion is correct as it stands.)*

Mary: "It is moved that the Society make a trip to Hawaii next May and stay at the Hilton hotel on Maui with the cost for each member covered by the Society Since this motion comes from a committee of five people, a second is not required. *(The candidate will get 0 points if s/he corrects this.)* Are you ready for the question? The chair recognizes member Susan."

Susan: "I move to amend by inserting, "at a cost not to exceed $5000 per member at the end of the motion." *(This is not a motion to insert but to amend by adding.)*

How will this be scored:

Grading Information:

Your performance will be scored using the criteria on the attached scoring guide. To pass this assessment, your total score must be at least 30 points. (Based on ten errors present.)

You must identify ten errors in parliamentary procedure shown in this script. You will not earn points if you identify correct use as incorrect and you will not earn points if you miss an actual error.

When you find an error, you will earn more points if you correctly explain why it is an error, and you will earn points if you correct the script properly.

In this case the Likert Scale that could be used is:

Points	Standard
0	Motion misidentified as wrong or missed error
1	Error found but not corrected
2	Error found but major mistake made in correction
3	Adequate. Answer is correct.
4	Excellent answer includes alternative language.

Evaluator Documents

- **The actual questions will be listed here along with the possible correct answers.**

- **The evaluator will be given instructions on how many points to award each item based on the quality of the answer. A Likert scale (sliding scale, for example: Poor, Acceptable, Good) will be used to award points.**

- **A feedback sheet will be provided to the candidates with detailed information about their performance.**

Possible directions for evaluator:

Description of Assessment
This is a Step Two assessment. The candidate will write an essay responding to the scenario and finding the ten items listed here.

Directions to Evaluator:
Fill in the scoring guide using the criteria described. The motions you should find are listed in the scoring guide. Award points based on whether the candidate has shown s/he has understood the correct places to interrupt and the correct advice to be given when interrupting the chair. Additional information that is given should not be scored unless it is incorrect. Additional incorrect information should have one point deducted from the total score.

Motion identified	Points earned
Main motion- correct	**0 1 2 3 4**
Second not required- correct	**0 1 2 3 4**
This is a motion to "add" not to "insert"	**0 1 2 3 4**
Postpone indefinitely is out of order after amend is on the floor. It is a lower ranking motion.	**0 1 2 3 4**
The amendment must be handled before the main motion.	**0 1 2 3 4**
The motion Request for Information should not be used to give information or engage in debate.	**0 1 2 3 4**
Solve problem of multiple amendments with motion to create a blank	**0 1 2 3 4**
The Previous Question requires that the maker be recognized and the assembly adopt it by a 2/3 vote. If the motion did not indicate that it was on all pending motions, the only motion affected is the current motion.	**0 1 2 3 4**
There is business pending. The privileged motion to adjourn requires a vote.	**0 1 2 3 4**

Feedback for the candidate

2

The candidate will be given blank scoring sheets before the actual test with the Likert scale described and the number of points awarded for each level presented.

Only evaluator will see the actual questions and answers before the test.

The candidate will be given their scoring guide after the test with comments explaining why any answer was not awarded the full possible points.

Feedback for the candidate (cont.) ②

Each test will have its own passing score. Tests may be repeated if they are not passed.

While each candidate will take one test selected from several options, all tests will cover the same kinds of material and be scored in the same way.

End of Part One and Part Two

We are happy to answer your questions!

Performance Standards

Comparing and Contrasting Those for RP and PRP

Motions

RP and PRP on Motions: Overview

1. RPs (and PRPs) are expected to be able rapidly to research and apply the rules in *RONR* governing any motion

2. For each of designated common motions, RPs are expected to know and apply basic rules without consulting *RONR*, while PRPs are expected as well to know and apply more advanced rules

3. PRPs are expected in addition to know and apply rules for the less common motions without consulting *RONR*

4. For both the common and less common motions, there some particularly complex rules that neither RPs nor PRPs are expected to know and apply *without* consulting *RONR* (but see # 1)

RP: Motions in General

- RPs expected to know how to find and apply all *RONR's* rules for motions
- Covered by RP Performance Expectations 1.1 through 1.12
- Must know the names and purposes of all motions (1.1 – 1.3)
- Understand the different classes of motions (main, subsidiary, privileged, incidental & those that bring a question again before the assembly) 1.4
- Understand what it means for motions to outrank or take precedence over others, and how to determine whether particular motions take precedence of or yield to others
- Understand and apply Standard Descriptive Characteristics, proper form to make motions

Main Motions

RP

- **Draft main motions & resolutions**
- **Know main motions SDCs**
- **How to modify/change a main motion**

PRP

- **Distinguish original from incidental main motions**
- **Motion to Ratify**

Secondary Motions

RP: *Body of Knowledge* motions expected to be known by members and leaders

- Amend
- Commit/Refer
- Postpone Definitely
- Limit/Extend Limits of Debate
- Previous Question
- Recess
- Adjourn

- Point of Order
- Appeal
- Suspend the Rules
- Parliamentary Inquiry
- Request for Information
- Rescind/Amend Something Previously Adopted
- Reconsider

Secondary Motions:
PRP: Less commonly used motions

- Postpone Indefinitely
- Lay on the Table
- Call for the Orders of the Day
- Raise a Question of Privilege
- Fix the Time to Which to Adjourn

- Object to Consideration
- Division of a Question
- Consider Seriatim
- Request to Be Excused from a Duty
- Requests & Inquiries
- Take from the Table
- Discharge a Committee

RP vs. PRP: Differences in what's expected for common motions

Amend

RP

- Explain primary amendments
- Concept of limiting amends re: same question of content/effect
- Proper terms and basic rules for insert/add or strike words/paras; strike & insert words; substitute
- Basic nature & cases adapted to filling blanks

PRP

- Explain secondary amendments
- Specific rules limiting changes in adopted amendment
- Secondary amends to strike paras and to substitute
- Rules governing filling blanks

Amend (cont.)

RP

- Apply rules defining germaneness to clear cases
- "Friendly" amendments

PRP

- Give rationales when debatable whether amendment germane; option to submit to assembly
- Amendments in order after a motion referred to a committee is reported back

Commit or Refer

RP

- Difference between main and subsidiary motions
- SDCs 3-7
- Basic rules for adhering motions

PRP

- Dilatory motion to commit
- Dealing with omission of required elements of a motion to commit
- Detailed rules for adhering motions

Postpone Definitely

RP

- Difference between main & subsidiary motions
- Basic rules on application to adhering motions
- Use to create special order
- Limit on time to which a question can be postponed

PRP

- When not in order
- Detailed rules on adhering motions
- Postponing to an adjourned meeting

Limit/Extend Limits of Debate

RP

- **Difference between changing number or length of speeches and directing when debate closed**
- **SDCs 3-7**
- **Meaning of "order" and "exhausted"**
- **Applicability to 1 vs. series of motions; supersession**

PRP

- **What subsidiary motions may and may not be made when pending and after adopted**
- **How to make in order subsidiary motion not otherwise in order**
- **How order to limit/extend limits of debate exhausted, and effect**

Previous Question

RP

- **Effect of PQ on motions made previously and sought to be made subsequently**
- **How moved on 1 vs. series of motions**
- **SDCs 3-5; 7**
- **Meaning of "partly" and "fully executed" and their relevance**
- **Nonstandard motions for PQ**

PRP

- **Effect on undebated preamble**
- **Laying PQ on the Table**
- **Interruption of execution**
- **How PQ exhausted, and effect**
- **Reconsideration of PQ and of a vote taken under it**

RP: Recess

- Distinguish Recess and Stand at Ease
- Difference between recess and adjourn
- Difference between main & privileged motions
- SDCs 3-7
- Declaring and postponing a scheduled recess

Adjourn

RP

- When Adjourn is privileged even when no question pending
- 3 characteristics differentiating main from privileged motion
- SDCs 3-7
- What is in order before adjournment declared
- Declaring or setting aside scheduled adjournment

PRP

- Adjournment of bodies without regularly scheduled meetings
- Limits on renewal
- Moving without being recognized
- Effect on business pending or uncompleted at adjournment

Point of Order

RP

- **Purpose of and procedure for Point of Order**
- **Timeliness requirement; rapidly research & apply exceptions**
- **SDCs 3-7**
- **Precedents set by rulings on Point of Order and how to supersede them**

PRP

- **Adhering motions with reference to Point of Order**
- **Concept underlying timeliness exceptions; the 6 exceptions**
- **Remedy for violation of right to vote**
- **Procedure for referring Point of Order to the decision of the assembly**

Appeal

RP

- **2 exceptions to right to Appeal**
- **3 cases when appeal undebatable**
- **SDCs 3-7**
- **Distinguish appealable rulings and unappealable factual judgments**
- **Procedure for handling Appeal**

PRP

- **Adhering motions with reference to Appeal**

Suspend the Rules

RP

- **Purpose and manner of suspending rules**
- **7 categories of unsuspendable rules: identify & rapidly research and apply**
- **Differences in vote required to suspend different types of rules**
- **SDCs 3-7**

PRP

- **Prohibitions on and exceptions to suspending rules in bylaws**
- **7 categories of unsuspendable rules: explain & rapidly research and apply**
- **Renewal of Suspend the Rules**

RP: Parliamentary Inquiry

- **Purpose and procedure for Parliamentary Inquiry**
- **SDCs 3-7**

RP: Request for Information

- Prevent misuse to *give* information instead of requesting it
- Purpose and procedure for making and handling
- SDCs 3-7

Rescind/Amend Something Previously Adopted

RP

- Purpose and effect
- Procedure for giving previous notice of and making motions to R/ASPA
- SDCs 3-5
- Rapidly research and apply SDCs 6&7

PRP

- Effect of amendment outside scope of notice on R/ASPA when previous notice was given
- 3 categories of actions that cannot be rescinded or amended
- Rescind & Expunge from the Minutes

Reconsider

RP

- **Purpose & procedure when Reconsider moved when it can immediately be taken up**

- **Circumstances in which can't immediately be taken up & suspension &procedure then**

- **When inapplicable; SDCs 3-7**

- **Debating reconsidered motion**

PRP

- **Reconsideration of subsidiary, privileged & incidental motions**

- **Reconsideration in committees**

- **Reconsider and Enter on the Minutes**

PRP: Less Common Motions

Postpone Indefinitely

- **Purpose and effect**
- **SDCs 3-7**

Lay on the Table

- **Purpose and effect**
- **Detect and deal with misuses**
- **SDCs 3-7 & part of SDC 2**
- **Renewal of Lay on the Table**

Call for the Orders of the Day

- Purpose and procedure
- SDCs 2-7
- Difference depending on general or special order
- Distinction in procedure for handing Call for the Orders of the Day and handling the order of the day called for
- Procedure for setting aside orders of the day

Raise a Question of Privilege

- **Purpose and procedure**

- **SDCs 3-7**

- **Distinction in procedure for handing raising a question of privilege and handling the matter it brings before the assembly**

Fix the Time to Which to Adjourn

- **Purpose of and limits on moving Fix the Time to Which to Adjourn**

- **SDCs 2-7**

- **Difference between main and privileged motions**

- **Needed content and effect**

- **Rules governing adjourned meeting**

Object to Consideration of a Question

- **Purpose and procedure**
- **SDCs 1-7**

Division of a Question

- **Purpose**
- **SDCs 3-7**
- **Needed content and procedure for handling**
- **Distinguish divisible and indivisible motions and know alternate amendment to deal with indivisible motions**
- **Identify indivisible conforming amendments**
- **Recognize motions divisible on demand of a single member**

Consideration Seriatim

- **Purpose and effect**
- **SDCs 3-7**
- **Circumstances in which seriatim is default procedure and those in which chair may choose it**
- **Consider as a Whole**
- **Procedure for consideration seriatim**

Request to Be Excused from a Duty

- **Purpose and how it may be granted**
- **SDCs 3-7**
- **Acceptance of, declination of and resignation from a duty**
- **Resignation from membership**

Requests and Inquiries

- SDCs 3-7
- Difference before and after a motion is stated of a request to withdraw or modify it
- Procedure for maker's request to modify after motion stated
- Request to Read Papers
- Request for Any Other Privilege

Take from the Table

- **Purpose**

- **Status of motion taken from the table**

- **Time limits**

- **Taking a motion from the table in preference to a new unstated main motion**

- **Rule against interruption of a series of motions**

Discharge a Committee

- Purpose of and need for
- SDCs 2-6
- Differences in vote required to adopt
- Reconsider and instructions to committee as alternatives
- Continuing existence (or not) of discharged committee
- Effect of discharge on motion discharged in varying circumstances

PRP only: Dilatory & Improper Motions

- Definition of dilatory
- Limits on and duties of chair dealing with dilatory motions
- Language not permitted in a motion

PRP only: Renewal of Motions

- **General principles governing**
- **5 cases in which a motion goes over to another session and therefore cannot be renewed at that session**
- **Rapidly research and apply rules on renewability of specific motions**

PRP only: Previous notice

- **Procedure for giving orally at a meeting**

Professionalism

RP Requirements

- **Appropriately work with clients**
- **Advise presiding officer how to deal with breaches of order in a meeting**
- **Advise presiding officer in addressing parliamentary questions orally**

Ethics & Professionalism

RP

- **Know & identify 16 items in Joint Code of Ethics for Parliamentarians**
- **Respond to scenarios based on Code**
- **Develop business plan**
- **Fee-setting & invoices**
- **Letters of agreement & contracts**

PRP

- **Apply 16 items in Joint Code of Ethics for Parliamentarians to alleged violations**

Parliamentary Terminology

RP

- Employ standard parliamentary terminology in all performance expectations

PRP

- Teach appropriate language to presiding officers, members, and committee chairs presenting reports

Teaching

RP

- **5 Knowles Principles for teaching**
- **3 learning styles**
- **Prepare lesson plan using SMART model and 4-step process**
- **Prepare and present lesson**
- **Evaluate one's own teaching**

PRP

- **Construct learning activities and performance assessment tasks**
- **Teach public workshops in parliamentary basics**
- **Prepare member parliamentarians to become credentialed**

Voting, Nominations, and Elections

Voting

RP

- **Majority, 2/3 & majority of entire membership standards; understand set of numbers to which proportion applies**

- **Basic rights & obligations in voting**

- **Plurality, tie votes, and chair's participation in voting**

PRP

- **Voting requirements based on # of members present and on fixed membership**

- **Recapitulation of roll call vote**

- **Detailed rights & obligations in voting**

- **Time limits on challenging, retaking, recounting, changing votes**

Voting (cont.)

RP

- **Votes by voice, rising, and show of hands**
- **Verifying vote and counting a rising vote**
- **Ballot voting, info for tellers**
- **Scripts for voice, rising, show of hands, and ballot voting**
- **Abstention and voting on questions concerning oneself**

PRP

- **Voting cards, machine/electronic voting, roll-call vote, absentee voting, voting by mail or email**
- **Scripts for taking votes by voting card, viva voce election, roll-call, and with proxy voting**

Nominations and Elections

RP

- Nominations by nominating committee and from floor

- Assist organization in preparing for and conducting nominations and election

- Designating method of election, completing election, establishing when election takes effect

PRP

- Six alternate methods of nominating

- Elections by viva-voce & roll call

- Cumulative & preferential voting

- Challenging announced result of election

- Timeliness of challenging point of order; voting body as judge.

Governing Documents

Bylaw Amendments (RP)
Bylaws Drafting/Revision(PRP)

RP

- Default rule to amend bylaws; notice requirements
- Draft, present & consider isolated bylaw amendments
- Procedure for considering conflicting bylaw amendments
- Provisos & heading
- Scripts to consider amendments

PRP

- Recommended steps for drafting original bylaws or revision, and procedure for considering (including no scope of notice)
- Apply *RONR* explanations of standard & alternative bylaws language
- Scripts to adopt, revise bylaws

Governing documents in general

RP

- **Basic appropriate content for different types of governing documents**
- **Apply Principles of Interpretation to ambiguous bylaws**
- **Drafting & consideration of special rules of order**

PRP

- **Detailed appropriate content for different types of governing documents**
- **Locate applicable procedural law**
- **Scripts for**
  - **Disciplinary proceedings**
  - **When chair acts improperly**
  - **To remove officer**

Meetings

Quorum

RP

- **Need for & effect of quorum**

- **Default quorum**
- **What may be done in absence of quorum**

PRP

- **Recommended standard for setting quorum**
- **Detailed quorum requirements**

Order of Business

RP

- **6 headings in standard order of business; when used**
- **Prepare memo of order of business**
- **Script using standard order of business**
- **How take business up out of order**

PRP

- **Detailed rules for Unfinished Business & General Orders**
- **6 optional headings for order of business**
- **Script using standard order of business with optional headings**

Orders of the Day

RP

- **Meaning of & basic rules governing general and special orders**

PRP

- **Priority of orders of the day when they come into conflict**

Agenda

RP

- Nature
- When used
- Procedure for adopting & changing
- Effect of providing in advance

PRP

- Relation of orders of day to agenda
- Procedure for taking up topics in an agenda

Minutes

RP

- **Duties of secretary regarding minutes**
- **Draft basic minutes**
- **Usual procedure to correct & approve**

PRP

- **Alternative forms of minutes**
- **Draft minutes with complex/unusual procedures**
- **Less common procedures to correct, approve & amend previously adopted minutes**

Recognition, Assignment of Floor & Interruption

RP

- **Basic procedures to assign floor**
- **General rule & 3 most common exceptions for preference in recognition**
- **Concept of interrupting member assigned floor**
- **Consult *RONR* Table II re: when interruption permitted**

PRP

- **Assign floor in large assemblies**
- **Consult *RONR* to apply detailed preference in recognition rules**
- **Identify all cases in which interruption permitted**

Handling Motions

RP

- **Memorize standard language for 6 steps for handling a motion**

- **Handle unanimous consent & assuming a motion**

- **Basic procedure and default rules for debate**

PRP

- **Follow detailed procedure in the 6 steps for handling a motion**

Debate

RP

- **Basic principles of germaneness & decorum**
- **Rules governing chair's participation in debate & discussion outside debate**
- **Basic concepts behind what motions are & are not debatable**

PRP

- **Detailed rules of length & number of speeches**
- **Detailed rules governing decorum**

Meetings –
Additional PRP requirements

Business Meeting Types; Meeting & Session

- Scheduling meetings in continuation of a session; rules governing adjourned meetings
- Chairman pro tem and session
- Public sessions

Meetings –
Additional PRP requirements

Conventions

- **Preparation for & conduct of convention**
- **Role of the 3 convention committee reports that organize convention**
- **Contesting seats & supplemental credentials committee reports**
- **Nature, consideration and adoption**
- **Amending, rescinding & suspending convention standing rules**
- **Adoption of and changes in program; procedure at expiration of time allotted to a subject**
- **Resolutions committee & platform**

Boards
and
Committees

Boards

RP

- **Different types of boards, executive committee & appropriate bylaws provisions**
- **Limits on rules of order for different types of boards**
- **Officer & board rights and responsibilities**
- **Ex-officio members**

PRP

- **Effect of periodic partial change in board membership**
- **Discipline in boards (and committees)**

Committees

RP

- **Standing vs. special committees**
- **5 methods of appointment to committees, incl. of non-members; appropriate considerations in appointing**
- **Instructions to & limits on authority of committees**
- **"Small board" rules**

PRP

- **Difference in committees of rules for Rescind/Amend Something Previously Adopted & Reconsider**
- **Continuity & conclusion of committee assignments**
- **Procedure in committees of the whole & quasi committee of the whole**

RP: Additional Points on Boards and Committees

- **Minutes regarding boards & committees**
- **Applicability of motions to limit debate in boards vs. committees**
- **Quorum in committees**
- **Calling and adjournment of committees**
- **Committee hearings**
- **Types of board and committee reports and presiding over their consideration**

PRP Only: Mass Meetings

- **Procedure to adopt and use rules of order in mass meetings**

- **Assumptions governing rules at mass meetings**

- **Adoption of original bylaws in organizing a permanent society**

- **Script for mass meetings and creation of societies**

PRP Only: Merger or Dissolution

- Differences between merger and consolidation
- Proper procedures for merger, consolidation & dissolution
- Need for legal advice when merging, consolidating or dissolving incorporated societies

Questions?