

Parliamentary Pearls

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OrthodontistsSM

About The Author



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Part 1 IN A SERIES

We have bylaws, policies, standing rules and orders to govern our organizations and we have a manual or parliamentary authority to govern ourselves in these deliberations and meetings.

This column will introduce some basics in parliamentary procedure to our up-and-coming leaders as they begin their journey to lead and preside over state associations, committees, councils, constituents and beyond. As with any academic endeavor, a bit of history is in order.



For the purpose of simplicity, let's begin with the history of parliamentary authority in this country. One of the first, if not the first parliamentary procedure manuals written in this country was Thomas Jefferson's 1801 *Manual of Parliamentary Practice*. Jefferson, as George Washington's vice president, presided over the Senate. There was no real organization to this body as its members came from various states, cities and abroad. Members of the Senate attempted to impose their personal rules of meeting governance so it was undoubtedly difficult to accomplish legislative business. Jefferson's manual became the authority by which meetings in the Senate were conducted. Today, the *Jeffersonian Manual* is still available but the House and Senate have generated supplemental rules for their respective bodies.

When one considers parliamentary procedure or formal rules used to conduct meetings, *Robert's Rules of Order*, usually comes to mind. General Henry Martyn Robert was the son of an abolitionist Baptist minister and the first president of Morehouse College. Born in Robertville, SC in 1837, Henry graduated from West Point and became an assistant professor of practical

military engineering at West Point. Later, as a lieutenant in the Union Army, he was tasked to preside over a meeting in New Bedford, Massachusetts. He plunged into the meeting – it did not go well. He reports "my embarrassment was supreme" and vowed not to run another meeting until he knew something about parliamentary procedure. He was unable to find resources that suited him so in 1875 he wrote *Robert's Rules of Order*. Unable to obtain a publisher, in 1876 he published it himself. General Robert died in 1923 and his body of work has continued with his son and grandson. The latest edition is the 12th and was released in 2020. *Robert's Rules of Order* is used by city and county governments, corporations, foundations and even home owners' associations. It is the most commonly used authority on parliamentary procedure.

Alice Sturgis was a nurse and parliamentarian who published her manual in 1950: *Sturgis Standard Code of Parliamentary Procedure*. Ms. Sturgis felt Roberts was too complicated and that it used obtuse and archaic language. Her book is much more readable and simplified, yet very complete. She taught at Stanford University and University of California.

Ms. Sturgis passed away in 1974 and the American Institute of Parliamentarians took over the responsibility

of making revisions and promoting her manual. In 2012 her manual was renamed the *American Institute of Parliamentarians Standard Code*. For short, it is referred to as AIPSC or just the *Standard Code*. This manual is used by the AAO, ADA, all dental state and specialty organizations, medical organizations and the United Auto Workers, to name a few.

Future contributions in this series will focus exclusively on the *Standard Code*.

- Dr. Jeff Rickabaugh

References:

The Presbyterian Outlook,
Jim Slaughter, May 8, 2023.

*American Institute of Parliamentarians
Standard Code of Parliamentary
Procedure*, 2012 Edition

Part 2 IN A SERIES

When it comes to meetings, someone has to be responsible to run the show. The individual at the helm of an official meeting can have various titles; Chairman, President or Speaker.

One could be the chairman of a council, committee or task force. Another leader could be serving as a constituent, component or national organization President - even the President of a Home Owners' Association, PTA, etc. Finally, the Presiding Officer could be the Speaker of a legislative body. It could be said that the Presiding Officer is the most important person in the room. This person must follow established standards and ethics to conduct the meeting.



Based on a calendar requirement or pending need, the Presiding Officer can call for a meeting. Bylaws and/or policy dictate the frequency of meetings, notice requirements, quorums (minimum number of voting participants), etc. The logistics of the meeting can typically be delegated to another member or to a staff person. Before the meeting, the minutes of the previous meeting are distributed along with an agenda and any necessary reference materials.

At the start of the meeting the Presiding Officer takes control. He/she should state: "I call this meeting to order." This is the cue for whomever is taking the minutes to start recording the events and for all others to direct their attention accordingly. Welcoming remarks are usually conveyed. Roll call, introduction of guests and possibly a brief statement from the Presiding Officer on the necessity of the meeting, if this happens to be a meeting called for a certain need, will follow.

In the past, the protocol was to have the minutes of the last meeting read. At this point a savvy member will usually make a motion to have the minutes of the last meeting accepted as presented in order to avoid the monotonous oration. However, the contemporary culture of the American Institute of Parliamentarians is now suggesting that the Presiding Officer ask "Are there any corrections to the last meeting's

minutes?" If there is no comment from the group, the minutes can then be accepted.

Following these preliminaries, the Presiding Officer introduces items in their agenda order. This is where ethics comes into play. While the meeting leader can encourage debate and even solicit motions for voting, the leader CANNOT state his/her opinion on topics. The leadership position requires absolute neutrality. However, if there is a topic that the Presiding Officer has a strong opinion to share, the person may recuse themselves as the Presiding Officer for that interaction and ask the next in line to serve as a Presiding Officer, pro-tem (for the time being). After disposition of that particular topic, the Presiding Officer will resume the duties of Presiding Officer.

During the course of the meeting, the Presiding Officer has an obligation to ensure that a motion and other discussion is "in order". Items that are out of order could be motions made about a topic not currently being discussed or something scheduled for later in the agenda. Discussion that is a personal attack on an individual, vendor or other organization is always "out of order". Motions to give membership money to political candidates or causes are "out of order". Motions to amend bylaws at the last moment are out of order. Finally, only one motion can be discussed "on the floor" at a time.

When motions are made, the Presiding Officer typically restates the motion and asks for a 2nd. Many times a motion is seconded before it can be restated and the Presiding Officer continues. Once the motion is seconded, it belongs to the assembly. After being seconded, the Officer opens the floor for discussion. When the discussion is completed or the same argument is continually repeated, discussion is closed and the body is asked to vote. The motion is restated clearly, necessary vote threshold is presented (simple majority or 2/3rds) and the vote is called. After the vote, the vote totals must be announced along with whether the motion was adopted or rejected.

The Presiding Officer votes only in the event of a tie. Again, this practice enforces neutrality.

After all agenda items are completed, the meeting approaches its conclusion. The floor could be opened for personal observations or GOOD OF THE ORDER comments from the Presiding Officer or other members. Also near the conclusion of the meeting, notice of the next meeting and other target dates are shared. Finally, the Presiding Officer can ask for a motion to adjourn. When that motion is heard, a strike of the gavel brings the meeting to an end.

In summary, the Presiding Officer takes control of the meeting from the outset. He/she completes the agenda as presented, ensures that the discussion remains pertinent, that everyone who has an opinion or concern can speak freely (only one individual speaks at a time), that voting is conducted properly and that the proceedings are conducted with professional decorum.

- Dr. Jeff Rickabaugh

References:

*American Institute of Parliamentarians
Standard Code of Parliamentary
Procedure 2012 Edition*

Part 3 IN A SERIES

Voting

Of all the activities a member in a leadership or governance position performs, voting is the most important. Stating one's opinion and voting are the fundamental principles of any parliamentary authority: one voice/one vote.



After a motion or resolution (written motion) has been introduced and seconded, discussion ensues. The discussion is limited to either in support of, or against the motion/resolution on the floor. When the presiding officer determines that the discussion is complete, the call for a vote is announced. When the vote is called, the presiding officer is obligated to advise the assembly, delegation, board, council, committee or task force of the voting threshold. For the adoption or approval of a motion a simple majority, or greater than 50% vote, is typically required. A tie vote count is not a majority and the motion fails. To amend bylaws and standing rules/orders, a 2/3rds vote is required. Very rarely is a 3/4th or even a unanimous vote required.

The simplest voting method is a voice count. All those in favor say "aye", opposed say "no". Mr. Al Gage of the American Institute of Parliamentarians insists we say "no" instead of "nay"; we are not horses! The other commonly used method is a show of hands; "raise your hand in favor" now lower and "those against raise your hand".

Sometimes in a large group, colored cards are given to the members at the outset to make it easier for the presiding officer to count the vote. Finally, the last visual method of voting is the standing vote; "all those in favor please stand"; be seated. "All those against please stand". If, with any of these methods, the assembly feels the vote count is very close and perhaps the presiding officer ruled the vote count in error, a motion of "division" can be declared. A new vote is then taken with tellers actually counting hands or cards or standing members. This counting is performed by tellers, non-voting members or executive staff.

Other voting methods available are with paper ballots and with electronic machines. Paper ballots are typically used in elections to ensure confidentiality. Again, with paper ballots, voting tellers are required. Usually two separate groups tally the votes privately, then confer and generate a short written tally for the presiding officer so the vote can be announced. Electronic voting is simply as suggested, a small device is used to record a vote that is transmitted to a technician who then relays the tally to a visual screen or the presiding officer. The machines are required to be tested before the meeting begins.

In this day and age of virtual meetings, a voice vote or show of hands will typically suffice for routine meetings. For those meetings which may be of a more serious nature, a voting app (election buddy) with cell phones should be used. The vote tally is transmitted via a cell phone to a host who then relays the vote count to the appropriate officer. This same method is required with hybrid type meetings, those with some members in person while others are virtual. In this case, everyone must use the same method, even those in person.

Finally, when voting, there are technically 3 choices; yes, no or abstain. All parliamentary authorities recognize the abstain prerogative, but this author has a personal bias against abstention. An abstention is a non-vote. It obscures voting thresholds and demonstrates the unwillingness of a leader to make a decision on behalf of the organization. Enough said.

Somewhere along the way, a young member has caught the eye of a more seasoned leader. The seasoned leader is confident that the new leader will serve the organization in a matter that will justify this trust. Do not disappoint; do your homework, show up for the meeting and vote.

- Dr. Jeff Rickabaugh

Part 4 IN A SERIES

Privileged Motions

Privileged motions do not relate to the pending business but when moved, take priority over any main motion or pending subsidiary motions.



This special class of motions deals with basic member rights, actions that require immediate attention, and actions of the assembly as a whole. These motions affect the comfort or convenience of the assembly or one of its members.

There are 3 privileged motions, listed below in order of priority:

- Motion to Adjourn
- Motion to Recess
- Question of Privilege

Raising a Question of Privilege allows a single member to request immediate action that affects safety, health, security, comfort or integrity. The presiding officer acts on a request, or allows the assembly to consider a motion, in order to meet an immediate need or emergency. Examples of Question of Personal Privilege could be:

- It is too noisy and request all who speak to use microphone.
- The content of this discussion is proprietary or too personal and move that this assembly go into closed session.
- The assembly hall is too hot, or poorly lit, or the screen is too difficult to see and so forth.
- Additional chairs are needed if all delegates are to be seated.

Typically, the presiding officer will directly act on a Question of Privilege without requiring a vote (majority) from the assembly. The Question of Privilege can interrupt the Speaker, is not debatable and is not amendable.

The second highest ranking motion is the Motion to Recess. The Motion to Recess orders an immediate break in a meeting and usually sets a definite time or event for the meeting to resume. The duration of a recess is usually brief, but there is no definite limitation on its length. The Motion to Recess is typically requested to allow a small group to confer or for certain members or Board members or Special Staff to obtain specific information to share with the assembly, or for the Speaker to confer privately on a special issue.

The Motion to Recess cannot interrupt a Speaker, requires a second, is debatable with restrictions and requires a majority vote. Amendments are limited to the time to reconvene or the duration of the recess. Finally, the Motion to Recess takes priority or precedence over all motions except to Adjourn.

The last privileged motion to be explained is the Motion to Adjourn. It has the highest priority or precedence. The Motion to Adjourn can be offered for one of two reasons: to end

a meeting or convention, or to end a meeting or convention and to set a time for a continued meeting.

When a main motion is pending, the Motion to Adjourn takes precedence over all other ranked motions if it takes effect immediately. The Motion to Adjourn terminates the meeting, requires a second, is not debatable, requires a majority vote, but it may be amended to establish a time and place for the current meeting to continue.

When a Motion to Adjourn is made, it is the duty of the presiding officer to see that no important business is overlooked before stating the motion. If the presiding officer knows of any important matter that has not been considered and requires action before adjournment, it should be called to the attention of the assembly. Finally, a Motion to Adjourn during voting is out of order.

Dr. Jeff L. Rickabaugh

References:

Cannon's Rules of Order; Hugh Cannon, 1992.
American Institute of Parliamentarians
Standard Code of Parliamentary Procedure,
2nd Edition, 2023.

Part 5 IN A SERIES

Etiquette for Virtual Meetings

The COVID pandemic of 2020-2021 was a worldwide cataclysmic event that ended millions of lives and irreparably changed the way we lived during those 2 years. One of those hurdles dealt with in-person meetings.

The pandemic ushered in the use of virtual meeting platforms since “face to face” was essentially forbidden. Various platforms such as Google Meet, Ring Central, TeamViewer Meeting and Zoom were, and currently are, utilized. Within the AAO world, Zoom is the preferred format.

These virtual/electronic meetings were categorized as “the next best thing to being there”. All across the spectrum of required meetings for small businesses, corporations and professional organizations, meetings were held virtually. Bylaws and policy manuals, guidelines issued by Secretaries of States for incorporated entities and so forth were amended to allow virtual meetings to be recognized as legitimate for reporting purposes. This recognition of legitimacy requires some proper etiquette.

Whenever a virtual meeting is held that requires any voting on motions on behalf of the organization, the active video MUST be operational, if at all possible, and the member easily seen. Actions for the management of the organization, nominations/elections or any spending motions require all the members to be seen by all attendees. Blank screens with just the member’s name or a photo are not acceptable. At the major corporation level for a Board of Directors, this legal mandate hedges against the remote possibility of a computer hack who is attempting to derail a Board’s actions.



All the requirements for an in person meeting are in effect for virtual meetings: notice; quorum; fairness in seeking recognition, making motions; points of order and appeals; debate; voting; and legal requirements. Each attendee is responsible for his/her electronic connection. After logging on members should mute their microphone. The presiding officer may cause or direct the disconnection or muting of an attendee’s connection if it is causing undue interference. Attendees must use the RAISED HAND feature to be recognized. Finally, minutes must be recorded.

For the virtual meeting, the host may be the presiding officer or the host may be another member or even a staff member in order to free up the presiding officer to focus entirely on the meeting. A host can be very helpful in advising the presiding officer that someone has utilized the RAISED HAND feature to seek recognition as well as ‘share the screen’ to provide information for the group. It is up to the discretion of the presiding officer if the RAISED HAND feature is to be used for all voting, or waving one’s hand on the screen or a voice vote will suffice. Detailed main motions or any resolutions are to be sent to the host/or presiding officer ahead of time to be shared. Only the host or presiding officer can record the meeting.

While seated at an in-person meeting, discussion amongst one another seated nearby is quite common. This same activity can be accomplished by texting each other on smart phones and should be encouraged during a virtual meeting as long as it does not disrupt the event. Debate in a virtual meeting should be limited to 20 minutes per main motion and a member can speak no more than twice, for no more than 2 minutes on a debatable motion. Sometimes voice recognition of each participant may be difficult so in larger groups, the member should state their name when recognized.

When the group exceeds 10-12 participants, additional electronic methods are required for voting. The use of a smart phone app, such as SLIDO, E-BALLOT or ELECTION RUNNER, will ensure accurate vote count, that everyone voted, and preserve anonymity with respect to elections.

Depending on the event, a dress code can and should be emphasized. The AAO has held a virtual House of Delegates meeting on 2 occasions with the Speaker, Board of Trustees, Reference Committee Chairs and others seated. All were instructed to wear a coat/tie (pants optional). This same format is expected for interviews for the position of Trustee-At-Large and like events.

Electronic or virtual meetings are here to stay. They provide an excellent opportunity to conduct required meetings from one’s home, office, car, hotel or anywhere else that has an available internet connection. At the same time, the same standards for an in-person meeting are to be utilized in virtual meetings.

Dr. Jeff L. Rickabaugh

References:

American Institute of Parliamentarians Standard Code of Parliamentary Procedure, 2nd Edition, 2023.

Part 6 IN A SERIES

Podium, Lectern, Dais: What's the Difference?



It is not uncommon to hear the words podium, lectern and dais used interchangeably. These are specific objects originally with distinct purposes.

A **podium** is a raised platform on which a speaker or performer stands. The key is that a podium is something to stand on, not something to stand behind. The simplest podium could be a soapbox, to coin a phrase. Podium comes from the Latin podium, with the same definition.

A **lectern** is a stand with a slanted top designed to hold notes or books for the speaker. Lecterns were traditionally wood, but nowadays are made of metal, plastic or glass. A lectern does NOT elevate a speaker, it is simply something a presiding officer or speaker stands behind and on which the speaker places materials.

The word **lectern** comes from the Latin *lectrum*, derived from *legere* meaning "to read". This reflects the traditional use of lecterns in churches, classrooms and lecture halls where speakers place books and notes.

Less often used are the terms **dais** and **rostrum**. Historically a **dais** (da-es or di-es) and **rostrum** were raised platforms at the front of the room used for honored guests, officials or speakers. Unlike a **podium**, which traditionally was for a single speaker, a **dais** or **rostrum** could accommodate multiple people such as a panel or head table. Nowadays, the term "podium" is used for most any raised stage.

However, at the American Dental Association House of Delegates, the raised section at the front of the hall is referred to as the dais.

This **dais** accommodates the Speaker, ADA President, ADA President-Elect, Executive Director, Treasurer and so on.

The word **dais** comes from the Old French *deis*, which originated from the Latin *discus*, meaning table or platform. This emphasizes its role as a space for distinguished figures.

The word **rostrum** comes from Latin and originally meant "beak". Roman warships had sharp, beak-like fronts to ram enemy ships. After battles, the Romans took these beaks (*rostra*) and used them as a stage where leaders gave speeches. Over time, "rostrum" came to mean the speaking platform.

These differences in terminology may seem minor, but for those of us who thrive in these parliamentary meetings, conventions and formal ceremonies, using the correct terminology enhances our professionalism and precision.

Dr. Jeff L. Rickabaugh

Reference:
Parliamentary Law Newsletter
Jim Slaughter, JD, *Parliamentarian*
Greensboro, NC



SSO Presidents Dr. Eric Nease and Dr. Matthew Ng at the podium during the SSO 2024 Annual Session in Orlando.

Parliamentary Procedure in Action

From its roots in ancient history as described in Dr. Rickabaugh's column, to our association meetings in modern times, the formality of parliamentary procedure helps our leaders and members conduct themselves at official meetings in a professional manner that is steeped in tradition.

To see this in action, make plans to attend the SSO Annual Business Meeting, which takes place at the Annual Session. Wondering the difference between **the meeting** and **the session**? Though you may see the terms used interchangeably, there is a difference! The SSO defines the **Annual Session** as a several-day event with educational lectures, networking events and an exhibit hall. The **SSO Annual Business Meeting** takes place during the Annual Session. It is open to all members and is required under our organization's governing documents. The Annual Business Meeting serves multiple purposes which may include board elections, evaluating mission progress, and strategic planning for the coming year.



This year the SSO Annual Session takes place November 6-8, 2025 in San Antonio, TX. The Annual Business Meeting takes place at 11 am on Friday, November 7 during the Annual Session. You can find dates for your state, or component, Annual Business Meeting on the SSO website.

The Rostra (speaker's platform) in the Roman Forum, the scene of Cicero's orations and many other great speeches in Roman history.

Part 7 IN A SERIES

Incidental Motions

Incidental motions are another special class of motions that arise out of the business that is immediately pending before the assembly.

These motions do not relate directly to the Main Motion, but instead relate to matters arising from the conduct of the meeting. Incidental motions may interrupt business, and may, if necessary, interrupt the Speaker. They may be offered at almost any time, have no order of rank and are disposed of prior to the business from which they arise.

There are nine Incidental Motions discussed in our Parliamentary Authority:

- Point of Order
- Motion to Suspend the Rules
- Motion to Appeal
- Inquiries; either Parliamentary or Factual
- Request to Withdraw a Motion
- Division of the Question
- Consider by Paragraph
- Verification of a Vote/Division of the Assembly
- Motion for a Counted Vote

The motions to Appeal, Suspend the Rules, Consider by Paragraph and Counted Vote require a vote by the assembly to proceed. The others are to be considered by the Presiding Officer if the particular request is in order or reasonable to be considered.

This Newsletter issue will consider the first two Incidental Motions listed and continue the discussion in subsequent Newsletter publications.



POINT OF ORDER

This motion is the most commonly used Incidental Motion and calls the attention of the presiding officer and the assembly to an alleged violation of the rules, an omission, a mistake or an error in procedure.

A point of order can be made if an item has been skipped on the agenda, or, some members have left the assembly before a critical vote, or, another main motion has been introduced before the prior motion has been addressed (only one motion on the floor at a time), or, someone presenting testimony has exceeded their 1 or 2 minute time allowance, for instance.

The presiding officer has a duty to call attention to the error and take corrective action. Citing the examples above, the Presiding Officer can suspend discussion on the current agenda item and go back to the agenda item in queue or inform the assembly how this error will be remedied. In the case of missing members, the Speaker may recall those who have left a meeting or suspend voting until those members return. In the case of a 2nd motion proposed, the Speaker merely states the 2nd motion is out of order. Finally, in the last example, the Speaker will ask the member to step away from the microphone.

Rules for a Point of Order:

- Can interrupt the Speaker because the violation should be corrected immediately,
- Does not require a second,
- Is not debatable in itself,
- Cannot be amended,
- Does not require a vote
- Can have no Motion applied to it except the Motion to Withdraw

MOTION TO SUSPEND THE RULES

This motion permits an assembly to take an action that would otherwise be prevented by a procedural rule. The rules may be suspended only for a specific purpose and only for the limited time necessary to accomplish the proposed action.

For instance, an organization may have a rule that only members be allowed to make testimony on the floor. If an invited guest(s) has/have been asked to provide some expert testimony, the motion to suspend this rule would be introduced, voted on and if adopted, the expert(s) would be allowed to share information with the assembly. After the expert(s) has/have completed their testimony, the suspension of the rules will expire.

Lastly, in 2020 and 2021, the COVID pandemic prevented in-person meetings. In response to that issue, the AAO House of Delegates was held virtually. As a state of Missouri non-profit organization, the AAO was required to have an annual meeting to elect its Officers, adopt a budget and establish dues for its members with the presumption these meetings would be in-person. However, there were no provisions in the AAO bylaws or House of Delegates policy manual to allow meetings electronically. This author called to order that first meeting with a solicitation from the Assembly on ZOOM to Suspend the Rules, and because there was no objection, the motion to Suspend the Rules that required an in-person meeting was approved. That 2020 House of Delegates was then conducted virtually from Winston-Salem, NC.

Rules Governing the Motion to Suspend the Rules

- Cannot interrupt the Speaker
- Requires a second
- Is not debatable
- Cannot be amended
- Requires a 2/3rds vote
- Cannot suspend quorum requirements, notice of meeting or voting methods, such as a requirement for a ballot vote

Dr. Jeff L. Rickabaugh

References:

*American Institute of Parliamentarians
Standard Code of Parliamentary Procedure,
2nd Edition, 2023*