

Applying RONR in the Field: Excellence as a Practitioner

From Quill to Keyboard

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When Henry Robert first envisioned his pocket guide to parliamentary procedure, I doubt that he could have ever imagined today's opportunities for information management and archiving. To him, corrections to the minutes were made by crossing out words and writing new words in the margins. Robert believed that the minutes "should be entered in a substantially bound blank book (Robert, 2001, p. 315)." This principle has been upheld in the latest version of Robert's Rules of Order Newly Revised (RONR): "The minutes should be kept in a substantial book or binder (RONR, 11th ed., p. 468, ll. 20-21)."

The College of William & Mary prides itself on its use of cutting edge technology. In 1996, while attending my first AIP Practicum in Williamsburg, VA, we were given a special tour of the moot court room. The highlight of our tour was a large collection of CDs for the judge to use for legal references. The way we store and process our official records has continued to evolve.

In 2004, thanks in great part to Rick Baltzersen at American Legal, the CD-ROM version of Robert's Rules of Order Newly Revised was introduced. Like so many new things, most of us weren't quite

sure what to make of it. We found comfort in picking up a solid volume and turning pages to find what we sought. Rick was very willing and patient with us as we struggled



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with this newfangled contraption. During that time, we learned what was really important. In this version, the line numbers were gone, and the page numbers were elusive! The developers worked to make the page numbers a bit more visible, all the while chuckling at our absolute need to be able to correctly enter citations. As time went by, I found that the CD-ROM version settled into a special place on my desktop – my virtual desktop, that is. I could create a user file to highlight citations and concepts that I wanted to use when writing exams, have a separate file to bookmark citations for opinions, and have my general user file with bookmarks to the most common citations that I needed to be able to bring up on a moment's notice while serving a client. Like a child waiting for Christmas morning, I still anticipate the coming of the 11th edition in that now irreplaceable format.

Technology has come to parliamentary procedure. We now live in the age of electronic documents, and that brings both blessings

and curses. Word processing was once touted as the way we would eliminate paper, but errors are so easy to correct that we sometimes find ourselves printing more, not less. Documents now exist in bytes, not books. Does anyone remember the last time a client mailed him or her a copy of the client's bylaws? Electronic distribution means that, without special controls, erroneous information can be spread faster and farther than a speeding bullet point. The marvels of digital documentation have created the need for some simple conventions described below.¹

Put a footer on every page of every document.

The footer gives basic information about the document. First, what is it? Second, what is its status? Third, where are we in the document? If this is a draft rather than a final document, then we have to know which version this is. More about version numbers in a bit, but first let's put the footer in its place.

Click on the Page Layout tab and look for the Page Setup section of that ribbon. There's a little arrow on the lower right corner - click on it. A page setup menu should appear with three tabs: margins, paper, and layout. Click on the layout tab and look for the headers and footers section. Change the footer measurement to 0.3" from edge (the bottom of the page). You

don't need a bigger margin unless your printer can't handle it, but most good printers can. Set it to the smallest number that you can to keep the footer from taking up too much room.

To set your footer, double click on the footer area to open it. Set your text alignment to right justified. This will make the footer rest in the lower right corner of the page. Make it distinctive, but unobtrusive. I prefer to use Arial Narrow 9pt. italic.

The footer will be three or four lines, depending on the document and its status. The first line tells who owns the document and what it is, as in the illustrations in the box on page 11. The second line tells its status. If this is a draft document, don't forget to use a disclaimer. If the document has been approved, give the date. The third line sets the location by giving the current page and the total number of pages in the document. This is done by using a command called "page x of y." In Word 2003, this command was very simple, but I've sent many curses skyward working with it in Word 2007. I finally set up a custom footer (that I still have to tweak to get it right). You'll find page numbers under the "insert" tab.

Use version numbers, not "final."

Death is final, documents are not. Even the final copy of the minutes is subject to future amendment.

If the document is a draft, your finished footer should look like this¹:

Minutes of LCO Board of Directors Meeting 10/20/12
DRAFT COPY – Not final until approved by the board
Page x of y
v1.0

Once the minutes are approved, the footer is changed, and the file copy is retained as the official record:

Minutes of LCO Board of Directors Meeting 10/20/12
Approved by 11/19/12
Page x of y

The same footer convention works for bylaws:

LCO Bylaws
As amended 11/19/12
Page x of y

It's a word that causes all kinds of complications, and sets unrealistic expectations. Sometimes people like the word so much that when the inevitable next version has to be released, they use it twice, and the copy becomes the final final version. Other times, when even that version is subsequently updated, it can become the really final version, or the final ha ha version. If you avoid the precipice, you won't fall off the cliff.

For documents that have been adopted, use the date of adoption in the footer. If the document is a governance document it has likely been amended, so use the latest amendment date. If the document has not yet been approved, use version numbers. The first draft of any document is version 1.0. This can prevent confusion when

multiple copies are in play, but the secret to version numbers is version authority.

Maintain version authority.

Documents are identified by their filenames and versions. The progression from first draft to current document will be much easier to follow if you start the filename with a date configured as yymmdd. For example, a file that is generated as the result of a committee meeting on September 1, 2012 will start with 120901. Starting your numbering with the year allows your computer to sort your files chronologically – starting with the month only works if you stay in one calendar year.

Version authority is particularly necessary when dealing with proposals to amend bylaws or other existing rules. Version authority

is the term used to describe the responsibility of the one person who enters all of the suggested changes in the document before it goes back to the group. For example, the parliamentarian usually provides the first draft of the language for bylaws amendments. Once that first draft heads into the cloud, additional changes might be suggested by a committee or staff member. When someone other than the person with version authority requests a change, they send it with tracked changes, putting their initials at the end of the filename. The changes from all of the collaborators are incorporated into the next version, which is generated with an updated version number.

When the version changes, the new version number is put in the filename and in the footer. When final action is taken by the assembly, the drafts can be destroyed, but in the meantime they provide an important record of the proposal's path to consideration. Everyone can literally be on the same page when they know they are looking at the same version of a document.

Use hard-coded formatting and efficient fonts and tabs.

Clicking on the track changes button is a good editing convenience.

Unfortunately, the incremental changes to governance documents are not simply "edits." Automatic formatting such as tracked changes

and automatic numbering can wreak havoc in documents that must go through many hands to be maintained. If the document has one owner, he or she can control the formatting. But when others will be updating (or copying sections for amendment proposals), the use of extra spaces to "make it line up" or automatic numbers that keep regenerating themselves make a ten-minute task an hour long agony.

Tracked changes have two big problems. The first is the use of red to show the change activity. About 8 percent of men and 0.5 percent of women are color blind (Heitgerd, p. 2). The red text, even with normal eyesight, does not show nearly the contrast that black text shows, and if the section is copied, it will paste as corrected. The ramifications of text that changes whenever it is handled are too great to use this shortcut. A better solution is to simply hard code the formatting: use the `strikeout` formatting command for text to be struck out, and the bold/underline convention for text to be inserted. It may seem like a bit more work at the beginning, but the confidence in and integrity of the decisions being made based on that text are well worth it.

There are a couple of additional formatting tricks that I have found very useful in working with association documents. One is tab sets. Back in the days of typewriters

we learned that tabs should be set at ½". That measurement can work for the start of a paragraph, but for governing documents that indent subsections you can end up with only the right half of the page showing text. Set your tabs at .25" for the first 2 ½ inches, then 1/2" for the next inch, and you'll still have a nice indent without wasting space and virtual paper.

Last, when formatting bylaws amendments for consideration by an assembly, make the best use of your space – especially if using a three column format that shows current language, proposed changes (with hard-coded changes, that is) and the text if the proposal is adopted. Those columns can run pretty long, but a great way to make best use of the space is with an Arial Narrow font. Arial Narrow allows for more text per linear inch, yet is easy to read because it is a san serif font.

Once the document has been approved, a file copy should be stored with the other official association documents. If the document is confidential, such as executive session minutes, use a tamper-proof sealed envelope and a locking file cabinet. Some associations have their lawyer maintain these records, but in one case that law firm dissolved and it took two years to track down a set of by laws for a homeowners' association. They were finally found in an attic at the former law offices. Whether we use the latest in technology or

a bound book, we need to ensure accurate records of the decisions made in deliberative assemblies. ★

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End Notes

1. Descriptions of the actions are based on Microsoft Word. Other word processing programs have similar abilities.
2. This example and the two below it from Trohan (2007) *A Great Meeting Needs a Great Secretary*.

Works Cited

Heitgerd, Janet L. et al. 2008. "Community Health Status Indicators: Adding a Geospatial Component." *Preventing Chronic Diseases* 5(3): 1-5. http://www.cdc.gov/pcd/issues/2008/Jul/pdf/07_0077.pdf

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