

# A I P COMMUNICATOR

SPRING 2021



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## President's Message: The Good, the Bad and the Ugly of Electronic Meetings

By Al Gage CPP, PRP, PAP



After just completing the most successful West Coast Practicum to date on Electronic Meetings, I thought I would share with you some of the takeaways from the Practicum. We had 113 register for the event and there was great discussion of the pros and cons of Electronic Meetings. This entire article is predicated on the assumption that a particular organization has authorized the use of electronic meetings and is compliant with both state law and the organization's governing documents.

At the Practicum, some expressed the sentiment that electronic meetings and education events are here to stay, and they are probably correct! There are several reasons for this sentiment. I will share with you that both our organization and the many organizations that I work for, have witnessed a dramatic increase in participation at their events because of the widespread acceptance of electronic meetings and their associated platforms. This probably does not come as a surprise, but the costs associated with both hosting the event and attendance at the event is generally less than an in-person event. There are no hotel, travel, transfer, or dining expenses associated with attendance. Additionally, the cost to participate is generally lower because the hosting organization does not incur as much cost or risk associate with the event.

But cost is not everything! Here is where we must distinguish between meetings and educational events. Great progress has been made in the delivery of educational events in an online environment. Almost all colleges and schools have figured out a method of delivery of education in a virtual format. Whether that content is as effective or viable long term remains to be studied and a verdict rendered.

As far as having a meeting, you still have to be able to have the meeting in an environment or platform that preserves the characteristics of a deliberative assembly. It is especially important that members have a methodology that allows them to protect their rights as members in a manner similar to or equivalent to an in-person meeting.

This presents a special challenge for very large meetings with the limitation of some of the platforms to 1000 participants. It appears this can be overcome by the addition of other platforms to resolve problems of recognition and interrupting motions, but I believe the consensus was this was both expensive (which should not be a problem with a meeting that large) and not entirely free of bugs and snags.

*Continued on following page*

## President's Message Continued

Many of the organizations that I work for also believe that debate in a virtual environment is somehow not as effective, should be limited or otherwise should be necessarily shortened. The only reason that I can envision for this to be true would be the well-documented online fatigue of sitting in front of a computer for several hours; however, this can be alleviated by having longer breaks, or by extending the footprint of the meeting to have more days that are shorter in duration. We have all been in the contentious meeting where everything is contested for the first few hours and then, as if by miracle, the body loses some of its fight and rapidly disposes of a great amount of business in the last few hours of the convention. I coined the phrase for this years ago and refer to this portion of the meeting as the onset of "Delegate Fatigue Syndrome". This is the portion of the meeting where disagreement of every small detail of a motion goes away and the discussion becomes more focused on the big picture aspects of an issue. In my opinion, this occurs in both a virtual environment and an in-person event. In a business meeting, there should be no difference in limitations on debate between an in-person and an electronic meeting.

As a result of the practicum, we also discovered that in many cases the parliamentarian has to take on new roles in the planning and execution of the meeting. As far as planning, the parliamentarian now has to ensure that the capacity and operation of the meeting platform will accommodate an increased number of attendees and that there is sufficient staff to perform all of the functions. Many of the staff that will, for instance, be monitoring the chat or recognition areas of the platform are not trained in parliamentary procedure and therefore cannot distinguish between a motion that requires priority recognition and one that does not. This may require either the retention of an additional parliamentarian or training by the parliamentarian for these staff members.

Capacity is one of those things that tends to rear its ugly head regularly. I recently had a client that said they normally hold their meeting in a hall that holds 500 people and have never had more than that attend a meeting so in this new virtual environment, they would simply limit the participation to the first 500 attendees as that was their online capacity. Of course, I corrected that thinking by advising the client that if any member was excluded from participation because of capacity to hold the meeting, the meeting could not be properly held. With the ease of participation in virtual meetings, on at least two occasions I have had clients exceed their capacity, one resulting in a continuation of the meeting and the other quickly switching the format to allow a larger participation. It should also be noted that when we return to in-person meetings, the capacity issue may be much more of a problem than before because, with social distancing guidelines, the hall that use to have a capacity of 500 may now only accommodate 100.

There are also negative effects of holding electronic meeting. The fatigue of staring at a computer screen for endless hours is real but not something I will attempt to address in detail in this article. That being said, more frequent and longer breaks are essential in maintaining engagement in the meeting.

One of the things that is sorely missed in an electronic format, is the camaraderie and social interaction with fellow members. One of my mentors, now deceased, Kay Andrews, PRP, used to tell me how she loved to go to parliamentary events every year to visit and socialize with her parliamentary friends. At the time, being a newbie, I remember thinking "How could you have parliamentary friends?" A decade later, I can attest that some of my fellow parliamentarians are my truest and best friends. Not having seen any but the tech team at the Annual Session last year, I deeply miss the interaction, discussion, arguments and being able to "speak the geek" to someone that understands. Yes, all of that can be done in a virtual setting or on the phone, but it just not the same. And missing the in-person interaction goes beyond seeing friends: I can personally attest to how difficult it is to preside at a meeting where you cannot effectively "read the room."

One of the duties of the parliamentarian is to advise the presiding officer of the proper procedure "as unobtrusively as possible." As parliamentarians, we have perfected the art of whispering to the chair, sliding them an alternate script, even sharing the script or advice to the chair on a separate monitor or teleprompter, or as a last resort turning into a parliamentary ventriloquist on those tricky motions. In a virtual world, my first option in this scenario is always to be in the same room as the presiding officer. If that is not possible, I have resorted to being simultaneously on a separate phone call with the chair or retiring to a breakout room with the chair and myself, neither of which is unobtrusive. If someone has a better way to do this, please let all of us know.

The final problem that I heard at the practicum is that some elected officials are using the requirement for an electronic meeting to avoid confrontation with their constituents. I do not know how compliant this situation is with Sunshine or Open Meeting laws in those cases, but it would seem they are not. If this truly is the case, then those elected officials should be voted out by their constituents.

I believe that the virtual meetings are here to stay. Many organizations see the increase in participation in a positive light. That is not to say that in-person conventions and meetings are a thing of the past. I believe many organizations will eventually go one way or the other or settle on some form of a hybrid that addresses the concerns expressed above. In the interim, the difficult decisions will be how and when it is safe to transition back to in-person meetings. Some organizations will miss and incur huge losses, and some will time it perfectly and have absolutely no issues. The important takeaway from all of this is that we as parliamentarians must continue to innovate and adapt our practices but more importantly be willing to share our experiences with our fellow practitioners.

I look forward to seeing all of you at the virtual East Coast Practicum, June 4 - 6th, 2021 and hopefully in-person at the Annual Session in August.

Al Gage, CPP, PRP, PAP

# PROPOSED AMENDMENTS TO THE BYLAWS AND THE STANDING ORDERS

All proposals shall be submitted by March 31st and include the specific wording, rationale, financial implication, and signature of the maker. A petition signed by five (5) members may submit proposals to the Bylaws and Standing Orders Committee at: [Bylaws@aipparl.org](mailto:Bylaws@aipparl.org)

Ref.: AIP Bylaws, Article XVI, Section 4; and AIP Standing Orders #20

## NOTICE OF CANDIDACY

AIP Standing Order 9.9 says:

**“Notice of Candidacy.** Any person wishing to give notice of candidacy for office at the annual session shall send to the AIP Secretary a statement setting forth the notice of candidacy. This notice shall be not more than seventy-five days prior nor less than sixty days prior to the annual session.\* The secretary shall forward these notices to the editor for publication in the pre-annual session Communicator.”

\*As the Annual Session is scheduled to start August 5, this notice period is May 22 - June 6.

Please note that notice is not requirement to be a candidate for an office.

If you wish to give notice, please send it to [secretary@aipparl.org](mailto:secretary@aipparl.org)

## CALENDAR OF EVENTS

Additional information regarding dates and registration will be available on the AIP website at [aipparl.org](http://aipparl.org) as they become available.

### East Coast Practicum (Virtual)

June 3 - 6, 2021

*Where the Book Ends*

The East coast practicum is limited to 150 attendees; use this link to [register today](#).

### Deadline Dates for the “Communicator”

May 15, 2021	Summer 2021 Issue
August 15, 2021	Fall 2021 Issue
November 15, 2021	Winter 2021 Issue
February 15, 2022	Spring 2022 Issue

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# A Message from the Authorship Team (Team) for the Second Edition of American Institute of Parliamentarians Standard Code (AIPSC2)

The Team is turning a corner and progressing to a new level.

The team of nine AIP-credentialed parliamentarians is itself further divided into squads of two and a project manager, Kay Crews. Each two-person squad has assumed responsibility for specific chapters in the book. There is also a legal squad, comprised of the four attorneys who are also members of the authorship team, led by Michael Malamut. The legal team has the responsibility for researching references cited, evaluating issues with legal implications, as well as, participating on their squad.

The goal of the Team is to maintain the comprehensive but clear and straightforward style of the parliamentary authority (AIPSC) and to make it applicable to the new, myriad forms of meetings which have become so pervasive, especially during the global pandemic. AIPSC2 will continue to be logical and intuitive, which makes it the parliamentary authority of choice for respected organizations such as, the American Medical Association, the American Dental Association, and many other related organizations, as well as many other associations.

The Team has made significant progress. The squads are nearing completion in their work of making initial edits to their chapters. The Project Manager is reviewing each chapter. Now, the whole team is beginning to focus on each of the chapters separately. This has been a major step to achieve. The excitement in moving from a narrow view to a more comprehensive view is shared by each member of the Team. It is an important process to ensure continuity and thoroughness. The Team has indeed turned a corner and progressed to the next level in the process of writing AIPSC2.

But the Team continues to be open to AIP members and AIPSC users. During the very successful online forum, which was held on January 14, 2021, in conjunction with the West Coast Practicum, various suggestions were offered to the Team. Each suggestion was forwarded either to the squad responsible for that particular area, or to the whole Team for further discussion. Further, suggestions to the website have been considered, as well.

It is not too late to offer ideas, suggestions, feedback, and concerns. Feedback and interactions with the authorship team can be offered on a website that has been established for this purpose. The website is: [www.AIPSC2.com](http://www.AIPSC2.com). Or emails can be sent to the Team at: [AIPSC2@aipparl.org](mailto:AIPSC2@aipparl.org). However, the Team recognizes the awesome responsibility bestowed upon it by the AIP Board of Directors. It is the Team's duty to decide the final content and will not likely incorporate all of the suggestions it receives.

One question frequently posed is "when will AIPSC2 be published"? The publish and distribution date have not been determined. The team's favorite answer to that question, however, is "first half of 2022 is within the realm of likely possibility and it will be worth the wait".

# Interested in the CP Exam?

You've taken that big step and applied to take the Certified Parliamentarian (CP) examination. Now you're probably wondering what type of questions you will be asked to test your parliamentary knowledge. Let's see if we can clear up some of the mystery.

There are four parts to the CP exam, and you may take a maximum of 1 hour to complete each part. Each part is closed as you complete it, and you are not allowed to go back to a previous part. It doesn't matter which part is taken first, although some prefer to begin with the narrative portion because it requires the most writing. In any of these exam parts, if you are handwriting the exam and need additional space to finish, you may ask the proctor for more paper. The number of points given in each part will vary, but you will be told in the on-site instructions how many points each part of your exam is worth.

In the narrative portion, often called a script, you will be asked to use the style of writing you might use when drafting the wording for a meeting. You will be given a series of motions and outcomes and you will write the words that would have been used to accomplish the outcomes presented. Your answer will necessarily contain the words each person says, thus the designation as a "script." Good references for this kind of writing are in the "Form and Example" demonstrations found with the motions in RONR 12.

One part is constructed of multiple choice questions which contain a stem and four potential answers. The stem may contain a blank to be filled, it may be an incomplete sentence, it may lead to a list of answers from which you must select the one that fits or does not fit the set. However the question is constructed, the answer to that question will be the one that best fits the stem. There may be more than one correct answer, but one will fit the situation better than the others.

Another part is called "short answers," and that's just what the test is looking for. Short answers should probably not be longer than a few words or one or two brief paragraphs. Some of these questions might ask you to "explain to the assembly how to . . ."; or "what is the chair's response when . . ." Yet again, you may be asked to explain a simple concept or arrange items in a proper sequence. It is important to be able to express yourself clearly and concisely when prompting a chair, explaining to an assembly, or writing a response.

One or two essay questions make up another part. The essay answers will be longer since they ask questions that are more nuanced or may use several principles to solve a problem. These questions frequently use a "compare and contrast" or "explain" format, or present a problem for analysis and recommendation. This part examines your ability to think critically to explain a rationale for, or the derivation of, your answer.

Other information about the exam and its parameters is included in the application package. Be sure to read that material again as you approach exam time to ensure you understand all the details. As always, if you have questions or need more information, please contact the Accrediting Director at [accrediting@aipparl.org](mailto:accrediting@aipparl.org).

Deadline for CP Examination Application Packets for the June exam period (June 7-21) is April 16.

Deadline for CP Examination Application Packets for the October exam period (October 4-18) is August 6.

Deadlines for the CPP Examination Application Packet is April 16 for exams to be given during the East Coast Practicum and June 4 for exams to be given during the Annual Session.

# AIP 2021 EAST COAST PRACTICUM

June 3 - 6, 2021

## Where the Book Ends

You asked, we heard you – loud and clear. The 2021 East Coast Practicum will be virtual and will be 3½ days in duration. Breaks will be more frequent and longer, based on feedback from previous virtual events.

AIP practicum labs, which provide a safe learning environment, have been increased by 25%. The times for the presiding sessions are being scheduled over the 3½ days at various times. You asked, we heard you – loud and clear.

The presiding sessions divided into three levels consisting of Basic, Intermediate and Advance. If you are wondering, at the **basic level**, the focus is on the fundamentals, with emphasis on language, cadence, and poise.

The basic level practice scenarios will cover:

- Main Motion
- Single subsidiary motions
  - Amend (including the AMP method of stating amendments)
    - A: State the amendment
    - M: State the motion if the amendment is adopted
    - P: Refocus the assembly on the pending question
  - Refer
  - Postpone Definitely
  - Previous Question/Close Debate
  - Recess
- Taking votes using Zoom “nonverbal feedback,” unanimous consent, show of hands, by voice, rising.

The intermediate and advance levels will separate AIPSC from RONR authorities and add the precedence of motions, fluency in processing motions and that the proposed motion is in order.

In addition, **intermediate level** builds on items already covered to include:

- Point of Order
- Appeal
- Suspend the Rule
- Reconsider
- Incidental motions
- Renewal of motions
- Secondary Amendment
- Filling blanks (AIPSC)
- Table (AIPSC)

The **advance level** practice will focus on greater fluency and presiding judgment. In addition to those things covered in the Basic and Intermediate level, specific motions may include:

- Object to the Consideration (RONR)
- “Stacked motions”
- Bring Back
- Filling blanks (RONR)
- Adopt in Lieu Of (AIPSC)
- Table (RONR)

As you can imagine, the presiding sessions extend a great opportunity to sharpen your presiding skills. Whether or not you aspire to add the title of professional presider to your CV, or preside with poise at your House of Delegates, time spent in these highly interactive and positive sessions are always beneficial.

Curriculum Director Valoree Althoff, CP, PRP, is excited about the plans to virtually explore the exciting topic of **Where the Book Ends**. The instructors are Atul Kapur, MD, CPP-T, PRP; and the Honorable Daniel Ivey-Soto, CP-T, PRP, also other guest panelists are being considered.

We will begin on Thursday, June 3 promptly at 2:30 p.m. (EDT); and 11:00 a.m. (EDT) Friday through Sunday, June 6 when we will end around 6:00 p.m. (EDT). A social hour is planned at the conclusion of each day.

Registration limited to 150 attendees is now open. [Visit the meeting page to register and view the event schedule.](#)

C.J. Cavin, Esq., CP-T, PRP  
Practicum Coordinator

Mary Remson, CPP-T, PRP  
Assistant Practicum Coordinator

**REGISTER TODAY**

# “What’s New in the Parliamentarians’ World?”

First, a humongous thank you to everyone who attended the 40th Annual AIP Virtual West Coast Practicum, “**What’s New in the Parliamentarians’ World?**” It was held January 15 - 17, 2021 and included the traditional keynote speech by 2020 Class President Cameron Decker and the election of 2021 Class President Justin Schmid. Secondly, special appreciation to the 59 participants who responded to the written evaluation. The information gained from the evaluations will be used to develop future events of AIP whether they are practicums, annual meetings, or some stand-alone educational opportunities. The major take-away from the evaluations is that no one complained about not having enough learning opportunities.

Curriculum Coordinator Mary Remson, CPP-T, PRP was challenged with selecting presenters to cover topics that were parliamentary in nature and/or involved modern technology. Craig Henry, CPP-T, PRP and C.J. Cavin, CP, PRP, the two lead instructors for this practicum provided their experiences and parliamentary expertise.

Craig took us down memory lane with his presentation “In the Beginning...A Brief History.” “Lights, Camera, Action!” was presented by C.J. and Mary. C.J.’s expertise was highlighted in his session: “Know the Technology.” “Best Practice: A Great Online Meeting” was discussed by a panel which included Craig, Al Gage, CPP, PRP; Kay Crews, CPP, PRP; and Colette Trohan, CPP-T, PRP. Another panel discussion “What you need; What you want; What you get!” included Al, Kay, Colette, and C.J.

Parliamentary topics included “12th Edition of Robert’s Rules of Order” in which Lorenzo Cuesta, PRP discussed the differences between the 11th and 12th Editions of RONR. “The Virtual Parliamentarian” by Adam Hathaway, PRP helped us understand the role of a parliamentarian. Michael Malamut, CPP-T, PRP covered “Virtual Meetings Rules with RONR & AIPSC.”

Craig combined both parliamentary knowledge with technical knowledge in his presentations “Electronic Voting and Election Pitfalls” and “Presiding in a Virtual World.” Craig teamed up with C.J. to present “Level Up – Teaching Virtually.”

A couple of topics gave us food for thought as we consider the future. Steve Bolen, PRP presented “What’s the Emergency?” where he shared his views on plans to cover other emergency meeting situations. We will look closer at our governing documents to ensure we are covered for emergencies. Jim Slaughter, CPP-T, PRP was able to present his vision of virtual and face-to-face meetings in the near-future during his pre-recorded session on “Preparation is the Key.”

This would not be a practicum without presiding practice, so of course, we had three presiding sessions. All presiding sessions had fewer than ten participants, thus each participant received individual attention and direction, which was the goal of the practicum staff. Kudos to the following members who assisted with the presiding sessions namely Atul Kapur, MD, CPP, PRP; Lucy Anderson, JD, CP, PRP; Valoree Althoff, CP, PRP; Ramona Hill, PH.d, PRP; Ann Guiberson, PRP; as well as to Kay Crews, CPP, PRP and Al Gage CPP, PRP for developing the presiding format that was used during this practicum. This format will be further improved and used in the future.

General Coordinator Dollie McPartlin, CP-T, PRP and Curriculum Coordinator Mary Remson, CPP-T, PRP extend our sincere appreciation and thanks to all of the over 100 parliamentarians who signed up for this first virtual AIP Practicum! We enjoyed having you. Promise that you will not let this be the last practicum you attend!

Dollie McPartlin, CP-T, PRP  
General Coordinator

Mary Remson, CPP-T, PRP  
Curriculum Coordinator

# Be Southern

Recent experience working as a “virtual” parliamentarian has caused me to reflect on the admonitions of Hugh Cannon, author of Cannon’s Rules of Order (1992). Those of you who have read and studied his book, or heard Hugh speak, know his focus on the presider and specifically having an effective presider. For those of you who have neither under your belt, let me catch you up on Hugh.

Hugh Cannon was one of the most experienced parliamentarians in the country for many years. He was a native of South Carolina and his working life was spent in North and South Carolina. He was an attorney, but as he would tell you, his “profession” was “used car salesman.” During his professional days as a parliamentarian, he worked large conventions: labor, political and professional. His work was not limited to certain types of groups or ideologies. He focused his thinking in parliamentary procedure on making the presiding officer look like a hero in every meeting. He did that by articulating the procedures of the parliamentarian as a flow chart of choices; and learning to anticipate the next move and prepare the presiding officer to respond. He was proud of his work and his innovations, which many of us use; but had a self-deprecating sense of humor. Thus, many times when other parliamentarians asked how to get by delivering bad news, his response was “be southern.”

So, what did he mean when he said this? I think he meant several things and I want to explore each of them with you. Remember the JFK quote that “Washington is a city of northern charm and southern efficiency.” <https://www.washingtonpost.com/archive/opinions/2006/06/04/ask-not-where-this-quote-came-from/ca3a139f-0060-477e-9693-48b08f6d0e20/>

It is a descriptive, self-deprecating quip that uses stereotypes to convey its point. “Be southern” is the same thing. Southern here means: appearing slow both in speech and thought, courteous to the point of exaggeration, slow to anger, insistent on protocols of respect and reliance of authority as the arbiter of rules for courtesy and protocols. I hope you see where this goes: Robert was a natural fit for Hugh. He was Southern in his approach, but not in his goals: with efficiency get all the work done that is supposed to be done in this meeting.

So, what about being a virtual parliamentarian has called this up for me? The virtual format requires that one act in a single dimension, a flat screen from which the video and audio emanates, to carry out the responsibilities that are allocated to the parliamentarian starting with making the chair look like a hero in the meeting. The recently completed AIP West Coast Practicum provided many hours of consideration to the experience and equipment of the virtual parliamentarian. Craig Henry in the recent practicum said: “take it slow and steady” as the presiding officer; and

praised Hugh’s book for guidance in virtual meetings, even though it significantly predates the technology that permits virtual meetings. Good information from experienced professionals. I could hear that mellifluous Southern accent chuckling in my ear: “just be Southern.”

Here are some of the ways that recent virtual meetings have caused me to think: “be Southern.” For Hugh, it would not be necessary to remind the professional parliamentarian how to dress for the meeting; or to remind them in fact to dress for the meeting. The temptation to dress from the waist up is strong in the world of the virtual. However, the virtual parliamentarian is engaged in business and benefits from the authority of a professional appearance. With the limitations of the electronic medium, the patience and cadence of the southern gentleman serves to maintain a proper pace.

Hugh’s “be southern” requires the equal treatment of all members, based on a determined and accepted set of social norms. A gentleman prepares for all of his guests to be comfortable, to have access to all of the amenities equally and to continue to have the guests reminded of these for their comfort and use. A gentleman has enough food and drink that all guests will have sufficient for their needs and desires. A gentleman will not let one guest take over the event nor will he let one guest insult another. A gentleman will engage with each guest in a positive manner unless the guest transgresses the rules of courtesy and sets himself apart from the group. A guest who misbehaves is admonished to conform his behavior and if he does not, he is asked to leave. When the guests are sated, they leave, knowing they have had a great time and hoping to be invited to return for the next event. These basic norms can be used to govern the virtual meeting.

Depending on the size of the meeting and complexity, the virtual parliamentarian and the presiding officer must state and re-state the specifics of how to be recognized, how to get one’s motion before the group, how to vote on the pending matters and what is the specific pending matter. For when the meeting is over, the goal is that participants feel that the meeting was productive, that each member had a fair opportunity to present his issues for consideration and that each member can look forward to the next fairly, and efficiently run, meeting. To paraphrase Maya Angelou: People will forget what was done at the meeting but they will not forget how they felt they were treated.

So, for me, raised in the social milieu that Hugh knew and appreciated, his admonition to be southern rings loud and clear in these virtual meetings. And now it is clear that several prominent parliamentarians are also reminded of Hugh in this new world of virtual meetings.



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