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Shifting Shores from Robert's Rules to Roberta's

An easy way to visualize the process of managing a nonprofit organization is to think in terms of steering a traditional sailing ship on the sea. Using this metaphor, this book will help your organization voyage across open water from the shore that represents Robert's Rules of Order to the shore that represents Roberta's Rules of Order. In organizations as in sailing ships, regardless of their size, it takes a strong structural design and equipment, a skilled crew, and a forward focus to deal with the forces in the outside environment.

Think of a body of water with two opposing shorelines. Imagine that Robert's shore is due west, on your left, at 270 degrees on the compass, and Roberta's shore is due east, on your right, at 90 degrees. The sea in between, the site of your journey, both going forward and turning around, contains the key elements you will want to address to successfully adopt Roberta's Rules of Order. The cultural changes involved in the shift from the Robert's Rules of Order shoreline to the Roberta's Rules of Order shoreline are summarized in the following two lists of waypoints:

<i>From Robert's Shore</i>	<i>To Roberta's Shore</i>
Formality	Informality
Strict rules	Guidelines and agreements
Parliamentary procedures	Democratic principles and processes

1900s language	2000s common usage
Military terminology	Civilian terminology
One size fits all	Flexible, by culture
For English and European males	For members of a pluralistic society
Requires win-lose voting	Encourages win-win decisions
Two decision choices (yes or no)	Straw polls and multiple choices
Controlled	Relaxed
Complicated	Simple
Debate	Dialogue and conversation
Motions	Proposals precede motions

Moving from Robert's Shore to Roberta's Shore

The characteristics of these two shorelines describe organizational attitudes and methods that are very different. If your organization likes it on the Robert shore, then there is no reason to cast off and leave. However, if this shore's complexity frustrates your group's members, you're in good company. It may be time for the crew to *tack* and head to another shore.

If you choose to move from the Robert shore to the Roberta shore, you will be making a journey through some open water. It may be rough or smooth, depending on the course you take. Think of this journey not as a race to get to the other side but as a rally—a challenging course that requires you to periodically tack, or change direction (moving forward or even backward), with care. The order in which you decide to sail the course doesn't matter. However, on this passage you're encouraged to explore all directions of the compass at least once to get to the other shore. If you've already sailed one of the points of the compass, set your course for another. Decide your logical order, and proceed on the course you

choose. Think of each chapter as a buoy or channel marker that guides the way into safe water.

The Reason for Rounding the Compass 360 Degrees

This book is focused on making a cultural shift, not just on adopting new meeting rules. Some organizations may find that Roberta's Rules of Order resemble what they're doing now but have never written down. Others may find these rules a major sea change yet believe the time has come to make that change.

Think of each of the four compass directions as a close look at one facet of an organization, as if you were using a pair of binoculars. This close look will give you essential details but not the entire seascape. The broader picture represents a culture, a collection of habits or behaviors that influence each other. For example, to change the way a group meets (one compass course) is a good start but will have little impact on how decisions are made (a different compass course). To affect decision making, you will need new sets of decision-making rules. Similarly, having more focused meetings won't help much if people don't attend. Nonprofits have also been known to change the way they make decisions in practice but ignore the governance documents that were written many years ago and that specify a decision-making method. Conversely, changing the bylaws may do little to change actual behavior in meetings.

Like wind, tide, and current, which together affect how well a boat performs, the way you run your meetings, the way you make decisions, and the way you govern the organization *together* affect how the organization performs.

Taking the Whole Journey

Roberta's Rules of Order is written in a way that helps you take the whole journey, not just a little jaunt. The only way to see real change in an organization's culture is to approach the organization

as a vessel with interconnected parts—meetings, decision making, and governance. While working on these parts, you'll want to have a seaworthy craft and keep an eye on the elements. The three opposing elements to watch are the wind of simplicity or complexity, the tide of flexibility or rigidity, and the current of involvement or disengagement. *Roberta's Rules of Order* encourages the gentle elements of simplicity, flexibility, and involvement. Foster these elements in your organization and the journey will be easier.

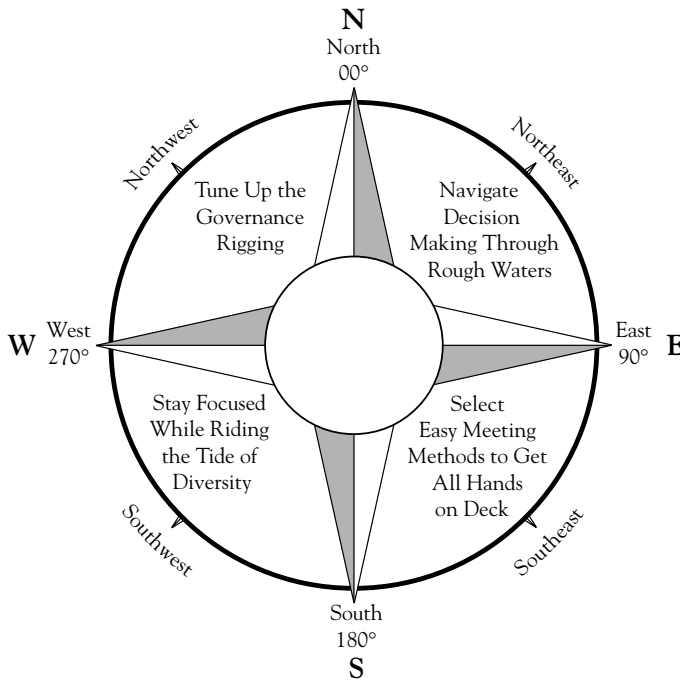
However, if you don't believe in fostering these elements stop reading now! If they do fit with your organization's culture—or with the culture you want to create—please continue to read and to use what you learn to improve your organization. After all, working in nonprofits and in business teams is all about making a difference. It's hard to make a difference when everyone is tangled up in the rigging of procedural formality and blanketed in fog.

Using a Compass Rose for Direction

Following the first two introductory chapters (Part I), this book is divided into four parts that correspond to the four sections of a compass (Figure 1.1). The four primary points on a compass (north, south, east, and west) have been combined to indicate quarters or sections (northeast, northwest, southeast, and southwest). These are called courses. Although your group may begin with any section that seems most appropriate, this book begins with decision making (northeast on our compass) because it seems to be the direction that is the most difficult for many groups to navigate. The remaining parts address planning and running meetings (southeast), keeping conversations focused and productive (southwest), and equally important, the design of the organization's structure (northwest).

In a ship, the design of the hull is necessarily related to its function. Ships can, for example, go no faster than *hull speed*, the speed made possible by the design of the hull. Sleeker, lighter designs allow increased speed. A sturdy keel will keep the hull moving for-

Figure 1.1. Four Courses Using the Compass Rose.



Note: See Parts II–V of the book in Table of Contents.

ward and prevent capsizing, except in extreme situations. Similarly, streamlining and simplifying its structure will help keep an organization flexible, nimble, and on the move.

Getting Under Way

As you sail your course you will become aware of some external forces—for example, the controversy and complexity surrounding decision making—that may cause you to change direction. Remember that the winds of change are always blowing. Just adjust your course, and don't get stalled or “in irons”—keep moving forward!

When you are ready, take the helm and chart your own course. Start wherever you find you need to begin, but continue to tack in

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each direction to cover all sections. The objective is to move through each of the major compass courses at least once and always keep making headway. The benefit is learning or being reminded of alternative methods of deciding, meeting, and interacting and of structuring the organization so that you can enjoy working together to fulfill your mission.