

## Workshops



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**Let's Reason Together, Learn Together, and Play Together**

## Workshops

This year's lineup of workshops and practice labs offers great options for all experience levels, regardless of whether you are credentialed. Choose from more than 30 educational sessions and practice labs to strengthen your parliamentary skills. Most sessions and labs are approved for continuing education units (CEUs). Credentialed members may earn up to 12 CEUs for the live event and 1.25 CEUs for each additional recording viewed.

### **Plenary Session: When Parliamentarians Should and Should Not Advise Clients About the Application of Procedural Law\***

*Thomas (Burke) J. Balch, PRP*



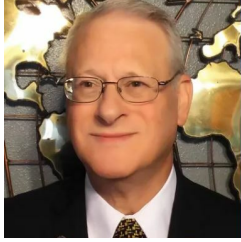
Parliamentarians who are not lawyers may not engage in the "unauthorized practice of law," but neither may they give advice which violates the law - such as advise that a motion is adopted which receives the majority of the votes cast but less than a majority of those present when a statute applicable to an assembly requires the latter. How can parliamentarians appropriately balance both responsibilities? This presentation will suggest a defensible approach to dealing with cases in which procedural law and parliamentary practice interact.



This workshop will explore the motion to adopt and the motion to ratify as presented in **RONR** 10:52-10:57, as well how the motion to ratify may be amended.

## RONR Crisis Management

John Berg, PRP



Most of us have witnessed meetings and even entire organizations spiral into chaos. In this workshop, participants will submit actual examples in advance to the presenter. Specific examples will be selected and analyzed by the participants in the workshop, discussing exactly what went wrong, how it occurred, what could have been done to prevent it from happening, and finally, how the situation can be corrected. The proper use of **RONR**, as the distillation of over 125 years of best practices in running meetings and organizations will be emphasized. Participants may submit examples of chaotic meetings by emailing [NTC2024@jb70.net](mailto:NTC2024@jb70.net).

## Professional Business Writing Lab for Parliamentarians

Robert B. Blair, PRP

This session will provide an overview of professional business writing including hands-on writing activities (individual and group) that will assist parliamentarians to better meet the needs of their clients and help better prepare those planning to pursue the RP credential. In-session feedback will be provided. This workshop is for in-person attendees only and is limited to the first thirty participants.



## The Parliamentarian Heretic

Steven Bolen, PRP

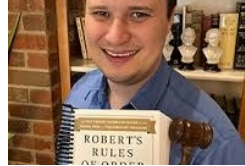


We have all heard the pushback against using *Robert's Rules of Order*, claiming they are too complicated and structured. Well, I'm about to commit to the biggest heresy in the parliamentary world: many, if not most, of those who attend parliamentary procedure training classes, don't want to join NAP or become parliamentarians. When children are introduced to Little League Baseball, they start with playing catch, not a discussion of the rules of baseball. Same is true of almost all activities, so is a motion chart the place to start? Is our standard approach to teaching Robert's the best method when considering a more general audience? The Rules aim to "help, not hinder, the business of the assembly." It isn't enough that the chair and the parliamentarian know the rules, but the knowledge must be spread across the body and our teaching programs should reflect that need. Improve your organization's effectiveness, not by training a bunch of parliamentarians but by providing the necessary knowledge to a wider audience in a way and format that the person who thinks about parliamentary procedure just once a month will use.

## Presiding at Dangerous Meetings

Gregory Carlson, PRP

This advanced workshop will explore how a presiding officer should prepare for and run the most challenging meetings. Using his experience as a professional presiding officer, the presenter will share several strategies for lowering the temperature, enforcing decorum, and helping members redirect their energy towards solving the problems facing the organization.



## Consensus Decision vs Deliberation by *RONR*

*Lorenzo Cuesta, PRP*

There are many reasons that are given by some associations when justifying the reasoning for not following *RONR*. In this workshop we will illustrate the most common alternate method promoted by those who seek to avoid *RONR*. The most common method that detractors follow is the Consensus Decision Method.

## Spilling the Tea on Building Your Business

*Tamara Dunning, PRP*

In this workshop we will talk about how to build your business. Where to find clients, how to market, how to write a proposal, and how to bill. We will spill the tea and answer all your questions including what parliamentarians charge and how to build repeat business. Also, what do you need to know to truly serve a client!



## Help! My Body Has Fallen and It Can't Get Up!

*Kirby Glad, PRP*

The motion to adjourn seems very simple but there are many nuances. It is used in almost every meeting—but it doesn't need to be. Can the chair just adjourn an unruly meeting? When is it debatable or amendable? What does it mean to set the time to which to adjourn? Can you lay a motion to adjourn on the table? What happens to the current business at an adjourned meeting? You won't want this workshop to adjourn!

## Don't Take It Personally: Understanding the Appeal Process

*Tamara Harris, PRP*

The Motion to Appeal the Decision of the Chair serves as a crucial avenue for individuals to express dissent, address disputes, and ensure fair decision-making. Contrary to common misconceptions, utilizing this motion does not amount to an attack on leadership; rather, it is a strategic tool designed to uphold the principles of democratic decision-making. This interactive and informative workshop invites participants to explore the nuances of the Motion to Appeal, both from the perspective of members seeking recourse and presiding officers tasked with maintaining order.



## Pitfalls in Engagement Agreements for Parliamentarians

*Roger Hanshaw, PRP*

A simple handshake and head nod is sufficient to tie down some parliamentary engagements. However, in other situations, it is useful to nail down details in a written agreement. Sometimes this is a quick one pager. Other times, a more detailed accounting of obligations may be required. This workshop will help participants understand how to develop legally sufficient agreements as well as how to gauge what type of agreement to use for various projects.

The PTFO was counting on Hetty Blocker, the famous baker, to provide delicious goods for the bake sale. After being advanced money to purchase ingredients, Ms. Blocker was a no-show at the bake sale and so were her goods. The PTFO is convening for a disciplinary trial to determine her fate.



## Considerations for Serving Your Client

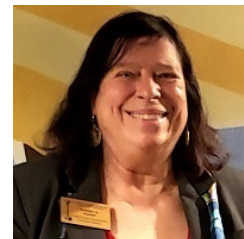
*Ramona Hill, PRP*

As professional parliamentarians, the processes and interactions we have with the client's staff and leaders are an important part of maintaining client relationships and confidence. This workshop will help participants consider strategies for providing client service that excels.

## Conflict Resolution Beyond RONR

*Esther Heller, PRP*

Parliamentary procedure provides a framework for civil discourse in a formal meeting. Section 61 of **RONR** provides ways to deal with members who behave improperly in such meetings. Sometimes, it is necessary to go beyond the formality of a meeting and deal with underlying issues to keep an organization running. This interactive session will provide information on strategies for dealing with conflict.



## I'm Telling It All: Role of Tellers in an Election

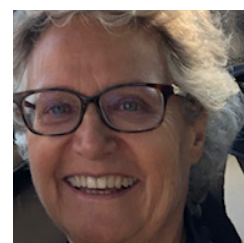
*Twylah Jenkins, PRP*

Tellers play an important role in the election of officers. This interactive workshop will provide participants the opportunity to enhance their understanding of the tellers' duties and responsibilities in executing a ballot election, what should and should not be done in counting ballots, how to report results, and how to archive ballots.

## Everything Was Going So Well, or Was It?

*Lucy Johnson, PRP*

For most of our meetings as parliamentarians, we are prepared, and we have made sure the client is too; all goes well. But what about those other meetings: an unexpected vote or last-minute change to the agenda or rules or a sudden uprising of the assembly? Is the advice to the Chair 100% correct? Maybe not? Then what? Have you ever experienced leaving a meeting and second-guessing yourself? Would there have been a better way to answer the question? Was the advice given properly? Just as parliamentarians all have opinions, we also have our own way of doing things. Is there more than one way to be right? The presenter will engage the audience with scenarios that lead to examining our actions.



## Pricing Practices for the Professional Parliamentarian

*James Jones, PRP*



Many professional parliamentarians are proficient at identifying the correct rule for clients. However, they are totally perplexed when it comes to understanding how to discuss their value with a client. This course will look at some of the strategies and techniques related to smart pricing. It will examine what factors impact appropriate pricing as well as how to



## What Are the Connections? Incidental Motions vs. Incidental Main Motions

*Cynthia Mayo, PRP & Margie Booker, PRP*

Incidental motions and incidental main motions are distinct motions with specific characteristics. Many people have asked for more specific information that distinguishes the differences. This workshop will provide an evaluation of Incidental Motions and Incidental Main Motions, where participants will be engaged in providing specific criteria for each motion and identifying examples of each type of motion, given specific criteria, examples, meeting scripts, and case studies.



## Ethical Considerations for Practicing Parliamentarians

*Helen McFadden, PRP*



All NAP and AIP members are expected to have a basic understanding of the Joint Code of Professional Responsibility. This responsibility is even higher for practicing parliamentarians

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the code attempts to provide guidance when operating in the gray areas.

## The 3Rs or Maybe the 3Cs?

*David Mezzera, PRP*

There are 110 main headings in the 12th Edition Index that begin with the letter "C." This workshop will cull out a dozen of those terms that a presiding officer should be deeply knowledgeable of and able to use with facility while running a meeting. The chosen will not be run-of-the-mill, everyday, usual terms needed to run a typical meeting. Instead, they will be a bit off-the-wall, some infrequently used, and a few uncommon meeting procedures that nonetheless, a skilled presiding officer should be keenly aware of when certain situations might arise that deal with those situations.



## Exploring Ethics: Professional Responsibility Workshop

*Jennifer Nickel, RP*



A series of hypothetical ethical dilemmas will be presented to participants for guided discussion. Participants will share views on the policies, tools, and practices, to best resolve these dilemmas in accordance with the Code of Professional Responsibility and Body of Knowledge for the Standards of Parliamentary Consultants.

## The Secretary's Snags and Snafus

*Carol Prahinski, RP*

As with any officer, aspects of the secretary position can cause difficulties. After interviewing more than 10 current and past NAP secretaries, we identify persistently common and sometimes uncommon snafus and produce alternatives to un snag the secretary and their organization.



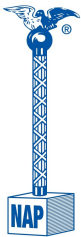


Recalling and explaining the numerous rules applicable to primary and secondary amendments during the amendment process can be challenging. In the context of the three basic forms of amendment and their variations, this workshop will examine the principle known as the "Settled Rule" and assist you with its application.

## Better Safe Than Sorry: Writing Custom Rules to Address Contingencies

*Daniel Seabold, PRP*

A rogue board, a dead-locked election, a president incapacitated by stroke—organizations face many risks, and they rely on parliamentarians to help them mitigate those risks. Let's explore a few different scenarios and see what custom rules we can draft to protect an organization from its worst fears.



## Harmonizing Meetings: The Artful Dance of Parliamentary Procedure, and Conflict Resolution

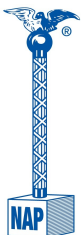
*Marsha Thornton, PRP*

Conflict is inevitable in any organization. Parliamentary procedure is sometimes viewed as a formal way to manage and resolve conflict. This workshop is designed to walk participants through the nexus of both disciplines and how knowledge of one can be used to support the other.

## Proxies: Parliamentarian in Peril?

*Miriam Simmons, PRP & David Whitaker, PRP*

All parliamentarians should be prepared for proxy voting. Some states require the use of proxies in homeowner associations, for example. Other types of organizations may want to use proxy voting, as well. What does the parliamentarian need to understand about proxy voting? What is the impact of proxies on members' rights? Can this help or hurt an organization? What do the governing documents say about the form of proxies, notice requirements, and limitations of use? *RONR* has very little information on proxies and the reasons for that will be examined, so we will include other authorities for further understanding of proxies.



## You're Treasurer - Now What?

*Lewis Vetter, PRP*

The participant will learn the fiduciary duty of the treasurer, as well as the fiduciary duties of the board of directors and members. The presentation covers the custody and management of funds, collection of dues and distribution of monies, periodic and annual reporting, the role of an audit and audit committee, and the treasurer's responsibilities of finance and budget. It addresses the practical issues faced by an incoming treasurer and how to address them.

## ParliBusiness: The Business of Parliamentary Procedure

*Fashika Willis-McClellan, PRP*

developing a business plan, preparing business proposals, contracts, and invoices for professional services, and establishing a method of setting fees. Additional areas of emphasis include creating and maintaining a client acquisition strategy/pipeline, working with clients to solve problems and problem-solving strategies, designing and presenting effective and appealing educational programs/trainings, and exploring active and passive business opportunities.



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