Robert's Rules of Ritualism

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Even though section 18 of the condominium regulations are unambiguous about using Robert's Rules of Order when there's no alternative in your bylaws to conduct meetings, few, if any, ever refer to this document for guidance. Instead, many "rituals" take form and become entrenched in board procedures.

This is Robert's Rules of Ritualism.

A guide that tiptoes down the fine line between the concrete and elusive world of condominium folklore.

This edition will focus on one such myth:

The motion to approve the monthly financials.

Join us as we refer to source documents and dispel one deeply entrenched myth.

Six chimes sound, the board in session draws near,
Agenda's bullet, the financials call.
A hush descends, anticipation... fear,
Who moves to approve numbers – the group, stalls:

"Can I have a motion to approve the financials?"

Hold on dear board member, before you leap into action, Robert's Rules of Order is your trusty guide through procedural myths and contains a little-known secret.

Let's go straight to the source:

"If the report contains only a statement of fact or opinion for the information of the assembly, the reporting member makes no motion for its disposal, as there is no necessity for action on the report."

A monthly financial report is exactly that – a report.

It's a collection of facts, or at least we hope they are facts. The management company or treasurer presents them, and that's it – you move on to the next agenda item.

This is where it gets interesting. If your management company is behind these creations, it is best not to adopt their work as your own by accepting it in a motion. Unless you can verify each detail, have access to source documents and the understanding to attest to their accuracy, better to merely received these reports.

Let the management firm handle the day to day bookkeeping and be responsible for their accuracy. When you take ownership by approving the financials every month, you are in essence diluting the whole reason for hiring professionals in the first place.

At the end of the year, when your financials have been audited, then you can safely make a motion to accept the audited financial statements, knowing it has been deemed accurate. This portion of Robert's Rules of order helps clarify:

> *"But if any action is taken, the proper motion, which should be made by some one else, is to "accept the report," which has the effect of endorsing the statement and making the assembly assume responsibility for it."*

When a board receives a report from an engineering firm with less than favourable news, the same enthusiastic hands are not quite so eager to vote. These gloomier reports seem to linger longer in old business. If the report includes some action, as part of its recommendation, say to make the balconies off limits until repaired because it is dangerous not to – these actions are approved by a motion of the board – as part of approving the report. The board should first read and understand the contents of that report, as it does take responsibility for its contents and endorses its recommendations.

For monthly financials, prepared only for the treasurer and the board, skip this motion; it will save a few minutes at your next board meeting.