

2023 AIP Virtual East Coast Practicum
Rules that run Societies – Organizational Governance
All Times Eastern

Thursday, June 1, 2023

3:00 – 3:15 p.m.	Welcome & Introductions	C. J. Cavin, JD, CP-T, PRP David Jackson, DHSc, PA-C, CP-T, PRP Lucy Anderson, JD, CP-T, PRP
3:15 – 4:00 p.m.	“So, You Want to be Credentialed!”	W. Craig Henry, CPP-T, PRP Accrediting Department
4:00 – 4:15 p.m.	Break	
4:15 – 5:45 p.m.	The Legal Side of Parliamentary Law Statutes, Laws Other “Legal” Rules in Governance (Articles of Incorporation, Declarations, etc.) Issues with Corporations, Community Associations, Unions, and Governmental Bodies	Jim Slaughter, JD, CPP-T, PRP
5:45 – 6:00 p.m.	Break	
6:00 – 7:30 p.m.	Presiding Lab #1 (90 minutes)	

Friday, June 2, 2023

11:00 – 12:30 p.m.	Organizational Governance What is Governance? What are Rules? The History of Rules/Rulemaking Governance and its Rankings	Todd Brand, CP-T, PRP
12:30 – 1:15 p.m.	Lunch Break	
1:15 – 2:30 p.m.	The Creation of Rules Bylaws Procedural and Parliamentary Rules	Adrian Stratton, CP, PRP
2:30 – 2:45 p.m.	Break	
2:45 – 3:45 p.m.	The Governance of Subordinate Bodies Parent Organizations and their Affiliates Board and Committee Governance	Michael Malamut, JD, CPP-T, PRP
3:45 – 4:00 p.m.	Break	

4:00 – 5:30 p.m. **Presiding Lab #2 (90 minutes)**
5:15 – 5:30 p.m. **Break**

5:30 – 6:30 p.m. Virtual Social Hour.

Saturday June 3, 2023

11:00 – 12:30 p.m. **Panel – Governance and Organization’s Staff**

W. Craig Henry, Moderator
Tessa Hultz, RCE, CAE, CIPS, C2EX, ePRO
Lee Woodward, PRP, CP
Al Gage, CPP-T, PRP, PAP, President AIP

12:30 – 1:15 p.m. **Lunch Break**

1:15 – 2:30 p.m. **The Eight Principles of Bylaws Interpretation Part 1** **Lucy Anderson, JD, CP-T, PRP**

2:30 – 2:45 p.m. **Break**

2:45 – 4:15 p.m. **Presiding Lab #3 (90 Minutes)**

4:15 – 4:30 p.m. **Break**

4:30 – 5:45 p.m. **The Eight Principles of Bylaws Interpretation Part 2** **Lucy Anderson, JD, CP-T, PRP**

Sunday June 4, 2022

11:00 – 1:00 p.m. **Financial Governance** **Evan Lemoine, CPA, PRP**
Why financial governance?
Required Financial Documents
(P&L, Balance Sheet, 990, new electronic filing requirements, etc.)
What Governance Documents Tell an Organization
Budgeting
Auditing

1:00 – 1:45 p.m. **Lunch Break**

1:45 – 3:00 p.m. **Interpreting Bylaws Group work** **Al Gage, CPP-T, PRP, PAP**

3:00 – 3:45 p.m. **Reporting out of Bylaws Interpretations** **Al Gage, CPP-T, PRP, PAP**

3:45 – 4:00 p.m. **Closing** **C. J. Cavin, JD, CP-T, PRP**