GUERRILLA GUIDE TACTICS FOR ALL MEETINGS
(Parliamentary and Nonparliamentary)

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In my over thirty years of experience in meetings (both meetings using parliamentary procedure and not using parliamentary procedure, such as meetings in businesses) I have learned many tactics that can make the meeting more effective and efficient! Many of these tactics are explained in greater detail in my book *The Guerrilla Guide to Robert's Rule*. This article is a summary of the tactics that can be useful in all of the meetings you attend.

This article will focus on the following subjects:

- Share Ownership of the Meeting
- Purpose of Meeting Clear to All
- No Agenda, No Meeting
- Role of the Meeting Chairman
- The Importance of a Second
- Focus Attention on One Issue at a Time
- Preparing for the Contentious Meeting
- Focused Issue Discussion
- Ownership of the Idea
- Speaking Rules
- Equal Knowledge of the Rules of the Group
- Impartiality of the Chair

Share Ownership of the Meeting

When attendees feel the meeting belongs to the meeting leader, all attendees expect the leader to keep the meeting in control. When the meeting leader shares the ownership of the meeting with the attendees, all participants in the meeting take on the responsibility for making the meeting efficient and effective. Some ways the leader can share the ownership of the meeting include:

- Ensure that all attendees know how and when to send in additions to the agenda, so that it is created by all attendees, not just the leader. Email makes this very easy!

- Before the meeting or at the beginning of the meeting, share agenda and estimated times for each item on the agenda. Then all attendees can help keep the group focused on the agenda.
- When leading the meeting, don't dictate, facilitate!
- Ensure that all attendees understand the reason an item is on the agenda and the desired outcome of that agenda item

The goal of the meeting leader is to have people coming to "our meeting", not the meeting of the leader!

- **Purpose of Meeting Clear to All**

So very often people go to a meeting knowing, at most, the proposed general subject matter of the meeting. Then, when they leave the meeting, they are very disappointed that not much was accomplished at the meeting. Not having a clearly defined purpose that is understood by all attendees sets the meeting up for failure.

The following are examples of four different purposes of a meeting:

Option #1: Our next fundraiser

Option #2: Determine the need for a fundraiser and, if applicable, the goals the fundraiser should attain

Option #3: Receive presentations on possible fundraisers and decide on our next fundraiser

Option #4: Receive a report from the Fundraising Committee on the next fundraiser and determine specific plans for that fundraiser

Think about how you would prepare for a meeting for each of the above stated purposes. Very differently! So if the attendees are to come prepared, the more specific purpose helps them do just that.

Think also of the frustration caused by going to a meeting where the stated purpose was Option #1, and from that you assumed that we were going to do Option #2 and in reality, the true purpose of the meeting was to do Option #4!   No matter how well Option #4 is done in the meeting, the person expecting to do Option #2 is going to be frustrated. The meeting is set up for failure before it even began!

As silly as it sounds, force yourself to write the purpose out in a complete sentence, or at least a complete thought. Then share that clearly stated purpose to all of the potential attendees. If the purpose is clear before the meeting, you significantly increase the chances of people coming prepared. If the purpose is not clear, meeting will probably not be focused.

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- **No Agenda, No Meeting**

Efficient and effective meetings demand an agenda. In certain situations, that agenda should be very specific and detailed. In other situations, (e.g. when creativity is desired or it is an emergency meeting), the agenda may be very general. But there needs to be an agenda!

Not only is it important to have an agenda, but you must make sure that all of the attendees have the agenda, preferably in advance of the meeting. When everyone knows the intended agenda, every attendee becomes an equal participant. Everyone helps keep the group on the agenda, instead of leaving that task up to the meeting leader.

Even impromptu meetings should have an agenda. For example, you call an emergency meeting because of a problem that just came up. Before the meeting, or on the way to the meeting, think through what things must happen in order to accomplish the meeting purpose. Then share those with the meeting attendees at the beginning of the meeting – or if there is a white board or flip chart, write them for all to see. That way if you have missed something, then other attendees can point that out at the beginning of the meeting.

Sharing the agenda is an integral part of the concept of sharing the ownership of the meeting!

- **Role of the Meeting Chairman**

Before ever opening the meeting, the person who is chairing the meeting should give serious thought to his role in the meeting. If the chair finds himself thinking about how to get the group to agree with him, he should not be serving as chair of the meeting. The role of the chair is to facilitate the meeting. The focus of the chair should always be on helping the attendees accomplish what they want to accomplish during the meeting, not what the chair wants to accomplish!

During the meeting the facilitative role of the chair includes observing and focusing on fairness. While the meeting is progressing, the chair should observe the reaction of all of the members to what is going on in the meeting. It is that observation that will help you determine the will of the group and help make sure that the will of the group is carried out. If you are constantly looking down at your notes and focusing on yourself, you will miss the reaction of the group and not be able to help facilitate the group to resolve its issue. If you are thinking about what to say or contributing your thoughts to the discussion, you are not able to appropriately observe and facilitate the meeting.

The second focus of a facilitative chair is on fairness. The entire basis of *Robert's* is fairness and that should also be the basis of all meetings. The role of the chair is to make sure fairness continues throughout the meeting. Therefore, the chair should think fairness as she recognizes people to speak. The chair should recognize the person who proposed the idea first. She should recognize people who have not yet spoken before those who have already spoken, and should recognize people who are going to share diversity of opinions before those who would repeat the same opinions.

The most important thing for the chair to remember is that the symbol for a chair is a gavel, which is a symbol of fairness and justice. The symbol for the chair is not a crown, which is a symbol of royalty. When serving as chair, you are not the king or queen, so don't act like it!

- **The Importance of a Second**

In a meeting conducted using parliamentary procedure when a motion is made, there are six steps in processing that motion. The second step is that a member, other than the member who made the motion, seconds the motion. If there is no second, the motion does not proceed forward but dies for a lack of a second. I have always believed that this parliamentary process should also be used in meetings that do not use parliamentary procedure.

Before discussion began on an issue, if the meeting chairman made sure that at least two people in the room wanted to discuss the issue, can you imagine the amount of time that would be saved? This is true for nonparliamentary meetings as much as it is for parliamentary meetings. I have frequently observed meetings in which discussion went on for a very long time and as you looked around the room, it was obvious that only one person was carrying the torch for this issue and cared about whether or not it was discussed.

The answer to this problem is very simple. Before spending time on any issue, the meeting chairman should check to make sure that enough people want to discuss the issue for the group to spend time on it. It could be handled very simply, by asking the group "Is this an issue that you find important enough for us to spend time on?" If only one person answers yes, then you should point that out come back with the comment that since there are not more wanting to spend time on it, we will move on to the next issue.

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- **Focus Attention on One Issue at a Time**

In meetings conducted using parliamentary procedure, there is only one main motion allowed at a time. Other motions that are allowed while that main motion is still being discussed must be applicable to that specific motion. If they are applicable to the subject, but not to that motion, they are not allowed to be discussed until that specific motion is voted on. This technique keeps the discussion focused and helps the group drive the issue to a resolution.

This same tactic can and should be used in non parliamentary meetings. It should be used in a less formal manner, but can be very helpful in keeping the meeting focused. Let's vision how it might be useful. When an agenda item comes up in the non parliamentary meeting, the meeting chair should early in the process facilitate the group to focus the subject so that it is very specific, instead of broad. So that instead of the topic being how to improve all of our processes (which could go in numerous different directions), we focus on how to improve our processes between Step A and Step B. Or instead of the topic being our remodeling project, focus the discussion on specific aspects of the remodeling project, one at a time.

If at the beginning of the discussion of an issue, the subject is very limited and focused, it is much easier to keep the discussion on task, instead of watching it wonder from one aspect to another and back again.

The problem with this approach is that people may bring up very good, unrelated ideas during the discussion. If the chair cuts them off, those ideas may be lost. That is where using a Parking Lot may help keep the group focused without squelching ideas.

If you are not familiar with the use of a Parking Lot, let me explain. When an idea comes up that has merit but is not relevant to the specific topic under discussion at that time, the Parking Lot is a great technique to capture the thought without disrupting the current discussion. The chair of the meeting, or any other member displaying leadership skills, indicates that the topic that is not related should be placed on the Parking Lot. The Parking Lot is either a flip chart that everyone can see or it is kept as a note by a specific member. Then, later, when the group has time to discuss the issue, it is taken off of the Parking Lot and discussed by the group.

Keeping the attention focused on one issue at a time takes a lot of discipline from the person chairing the meeting as well as from all of the meeting attendees. But, it can be extremely helpful in saving meeting time and reducing meeting frustration.

- **Preparing for the Contentious Meeting**

Whether the subject is contentious or the participants are expected to be, preparation is the key to success. Don't prepare, don't succeed; it is that simple! The first step in the preparation process is to plan your tactics. Plan in advance what issues need to be brought up and who is best to introduce them. Equally important is to plan your approach to the issues the other side may bring up.

Recruit your supporters. Make sure members who have like minds on your pet issue are planning to attend the meeting. Remember, almost every decision is made by majority vote, so be sure you have supporters of your issue in attendance when the vote is taken.

In advance of the meeting decide what rules will keep the meeting from being contentious. Some possible rules that help include the following:

1. Limit the length of time an individual may speak when called upon
2. Limit the length of time the group will spend discussing any particular issue
3. Not calling on someone to speak a second time on an issue until everyone who wants to speak has had a chance to speak a first time
4. Alternating between members speaking for the issue and those speaking against the issue

Deciding these rules in advanced and proposing them to the members at the beginning of the meeting can set a tone of fairness at the very beginning early in the meeting. All most people ask for in a meeting is an environment of fairness!

The most effective preparation for a contentious meeting is a meeting in advance of the actual meeting. Invite the key players and sit down and review the agenda. In reviewing the agenda, go through it with an attempt to vocalize all of the "What ifs" that might occur in the meeting. Then plan for those what ifs and how best to handle them. While it is true that you cannot possibly cover every what if, just reviewing some of them in the calm atmosphere of this pre meeting might help you better respond to the unanticipated ones that come up in the actual meeting.

- **Focused Issue Discussion**

Ideas become great ideas through focused discussion! But when the discussion is distracted, fuzzy, imprecise, and continually wonders off the point, it is difficult to follow, and the chances of the idea developing to greatness is reduced. Some discipline applied to the discussion can and will keep it productive.

Make sure that only one person speaks at a time. Difficult, I know, but not impossible. Create a since of fairness of discussion and it is more likely to happen. For example, make sure that people are not allowed to ramble on and on, that they are not allowed to go off subject, that they take turns, and that no one dominates the discussion. With that kind of environment, you are more likely to keep people listening to the speaker. Also, encourage people to write down thoughts and then indicate when they want to speak and make sure that they are called on in the order of when they asked to speak. Discourage side conversations. All of these simple things can create an environment where the group listens to the one person who is speaking.

Help make sure that the discussion by the group is leading to a conclusion, not just going in circles. In meetings conducted by parliamentary procedure, this is facilitated by the requirement that a motion is made before discussion begins. And then, the discussion can only be on the specific motion that was just made, not the general subject of the motion. In non parliamentary meetings, using that focus as a guiding principle will help the meeting move to a conclusion. It is here that the facilitation skills of the leader, or a member who is displaying leadership skills, can help the group move to a conclusion. Asking questions of the group that will force them to focus on the conclusion can be tremendously helpful.

Remember, having discussion without a purpose is great for social situations, but not for meetings. Make sure that everyone in the room understands the purpose of the discussion. And, if you don’t, ask the group to state the purpose. It will help them and you stay focused.

- **Ownership of the Idea**

In meetings conducted using parliamentary procedure, a motion is made, seconded, restated by the chair, and then discussion begins. After discussion begins on an issue, the ownership of the issue is transferred from the individual who made the motion to the group. It is no longer the property of the member who made the motion – they can not take their ball and go home if they do not like what the group is doing with their idea. They do not get to give permission or withhold permission if the group wants to change it.

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Their idea now belongs to the group and the group is the only one who can change it.

One method that makes it clear that the idea now belongs to the group and the group can make any changes they like is in the hands of the leader of the meeting. The leader should thank the person for sharing the idea, giving the idea appropriate credit, but then calling upon group members to develop it. Then, facilitate the group through changing the idea until the group is pleased with the outcome and believes that it is now theirs.

The group's feelings of ownership of the idea will help make sure it comes to fruition! The group is much more likely to make it happen if they feel ownership of the idea than if they believe the idea, and thus the responsibility for making it happen, belongs to the originator of the idea or even to the leader of the meeting.

- **Speaking Rules**

My experience is that most people don't like the idea of having speaking rules in meetings . . . until someone else goes on and on and on! Then speaking rules begin looking like a great idea. At that time, however , it can feel awkward to put them in place because the rambler might take it personally. The best time to determine and set speaking rules is when people don't believe they are needed.

Always have speaking rules of some kind in place and have the practice of using them. The worst thing the rules can do is ensure that all of the members are treated fairly when it comes to speaking time!

There are some rules that are paramount to equal treatment. The number one rule is one that should be put into practice whether you have established rules or not: No member may speak a second time until everyone who wishes to speak a first time has had the opportunity to do so. Another very useful speaking rule is to limit on the number and length of speeches during discussion. *Robert's* does that when he establishes that no person may speak more than two times for more than ten minutes each time.

The advantage to limiting the number and length of speeches is twofold. First, these limitations force a person to plan what they are going to say. If they can't bop up and down every time they get an idea, they begin making notes and organizing their thoughts – which is almost always a wonderful idea with many benefits!   Personally, I believe 10 minutes is far too long. After teaching speech at the college level for over 30 years, I am aware of how many ideas a person can get into a well planned 3 to 5 minute presentation and believe that the shorter limit is best. The second advantage to limiting the number and length of speeches is that in a given time period of discussion, that limitation ensures that you will hear from more members of the group. The advantage of group decision making is that you get ideas from many and various people. This rule increases the number of points of view that the group will hear before making a decision.

An additional speaking rule that can contribute to the quality of the discussion is to alternate sides of the argument. In a large convention, this is done very effectively by having pro and con microphones and alternating between them. In a smaller group, this can be very easily implemented by the meeting chair simply saying: "We just heard a member speak in favor of the proposal, is there anyone who would like to speak in opposition to the proposal?" There are many advantages to alternating sides, but the least obvious one that I have observed is that it has a tendency to shorten the discussion period. When the debate is very one-sided, alternating sides makes it apparent that it is one-sided and that continued discussion is probably not necessary. When no one wants to speak against the proposal, fewer hands go up to speak in favor of the proposal. Thus resulting in moving quicker to making a decision!

Speaking rules can be very effective. They need to be used wisely. A time when they are very effective is when a group has a very controversial issue and a limited amount of time to discuss it. At the very beginning of that discussion period, the establishment of a few rules can enhance the discussion and likely assist the group in making a wiser decision.

- **Equal Knowledge of the Rules of the Group**

Parliamentary procedure is all about fairness. Therefore, it is important that everyone in the meeting is on a level playing field. The best way to do that is to make sure that everyone in the room has an equal knowledge of the rules used by the group.

Research in group communication has for years supported the concept that all groups who meet over a period of time have rules. The rules may not be in writing, but they are there. The problem is that some of us are better than others at figuring out what are the rules of the group. Unfortunately some people only learn the rules by breaking them and paying the price.

In order to ensure that the playing field is level for all members, it is an excellent practice for a group to establish the rules that will be used by the

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group. In non parliamentary settings those rules are often referred to as a Code of Conduct, or as Ground Rules, or as Rules of Engagement. The rules may be focused on team behavior or on meeting guidelines. Whatever they are called and whatever their focus, the rules need to be decided by the group if the members of the group are expected to follow them. Then, they should be readily available to the group so that they are reminded to follow them.

- **Impartiality of the Chair**

In an earlier part of this newsletter, I discussed the role of the meeting chairman. One of the roles deserves additional attention. That is the need for the chair to remain impartial during discussion. As the leader, the chair should remain as impartial as possible during the discussion. That means not participating in the group discussion and ensuring that all sides are heard from and fairly treated.

Impartiality of the chair is frequently a very difficult role. And, it increases in difficulty as it increases in need. The more controversial the situation, the more difficult it many times is for the chair to remain impartial. Yet, that is the time when impartiality is needed the most.

Remember that the role of the chair is to guide the group through the meeting and to always focus on desires of group, not personal desires. When doing that, the group is more able to reach a well thought out decision.

There are times when the chair makes the decision that he or she can not remain impartial on a particular issue. For example, when you see your pet issue going down in flames and you believe you can save it! In that situation, it is best for the person to remove themselves from the chair and have someone who is willing to be impartial to serve as chair. There is nothing wrong with removing oneself from the chair, as long as it is not done too frequently. It is far better to remove oneself from the chair than to remain in the chair and not be impartial.

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