

## STRATEGIES FOR EFFECTIVE MEETING MANAGEMENT Effective Chairing of the Meeting

The average business person spends anywhere from 3 hours to 25% of the work week in meetings. My experience as a professional parliamentarian indicates whether it is the local city council meeting, school board meeting, or board meeting of a nonprofit organization, the number one complaint I hear is that meetings are too long. Every one of us could use some assistance in meeting management.

It is for this reason I decided to write this series of articles. Each article will cover a different strategy for effective meeting management: effective chairing of the meeting, facilitating discussion, and meeting follow-up. This article will cover the effective chairing of the meeting, which includes advanced preparation, focus on agenda, using all six steps of processing a motion, and, the most difficult, remaining impartial.

The greatest impact the chair can have on the meeting happens before the gavel is used to call the meeting to order. Preparation meetings can have a significantly positive effect on the actual meeting. If the meetings are held regularly, e.g. monthly, these preparation meetings should also be regular. The attendees at this preparation meeting should be, at minimum, the president and the CEO. If the organization has no staff, then the attendees should be the officers. If there is staff, key staff members might also be in attendance. The meeting should consist of a review of the agenda and the attachments. The purpose should be to finalize these documents and to review the flow of the meeting.

Another document that many of my clients find very helpful is a table that includes possible wording for all action agenda items. It may seem strange to determine in advance of the meeting the likely wording of the motions for each item, but for many, it has proven to be extremely useful. This table in no way should limit motion making in a meeting, but should supplement and support it. By the way, the secretary loves this document when writing the minutes!

During the meeting, members are free to use the suggested wording or to make any changes that they choose as it is easier to edit than to start with a blank sheet of paper. The motion format is completed during the meeting when you know

who made the motion and you know the disposition of the motion. The motion format may look like this:

## ***MEETING OF THE BOARD OF DIRECTORS***

**February XX, 201X**

#	MOTION	MAKER	ACTION TAKEN
1.	I move that we approve the minutes of the January XX, 201X Board of Directors meeting as printed and distributed to the Board members.		

When there is an expectation for a challenging or potentially controversial meeting, extra preparation is warranted. Most of us don't respond well to surprises, and this statement is never truer than in meetings. When there is potential for controversy, get the key people together and review the agenda, item by item. During that review of each item on the agenda, ask the "what if" questions and determine how to handle them. Try to be creative in figuring out what could possibly happen and how to handle it. Remember, you cannot possibly think of every "what if", but if you practice how to handle them, you are much more prepared for the meeting.

The chair of the meeting has the responsibility to prepare the agenda. The secretary and/or the chief staff person frequently assist with this responsibility. The agenda is crucial: so critical that you should not have a meeting without an agenda. It is desirable for the members of the organization to feel like the meeting is "our meeting" instead of the "chair's meeting". One method I have found extremely helpful in helping the members feel ownership in the meeting is to have a known system for them to have input on the agenda. Here is a possible example: If the meeting is held on the second Tuesday of the month, then the week before, send out an email to all of the members asking if they have any items that they would like added to the agenda and ask for the suggestions by close of business on Wednesday. On Thursday, prepare the agenda and send it out to the members by Friday morning.

In preparing the agenda, be sure to identify on the agenda each item that will require action and each item that has an attachment included in the agenda

packet. Identification of both of them will assist the members in preparing for the meeting.

Effective chairing of a meeting requires proper processing of a motion. Since the only way that an assembly takes action is through the processing of a motion, the chair must process that motion clearly, so that everyone can follow. There are six steps in processing a motion:

Step 1. A member makes a motion

Step 2. Another member seconds the motion

Step 3. The chair states the motion, therefore formally placing it before the assembly

Step 4. The members debate the motion

Step 5. The chair puts the question to a vote

Step 6. The chair announces the results of the vote

While all six steps involve leadership from the chair, Steps 3, 5, and 6 focus on the chair. They are the crucial steps in ensuring that everyone involved in the meeting knows what is going on at any point in time in the motion process.

The 6<sup>th</sup> step, the chair announcing the results of the vote, is crucial to the clarity of the process. It should include:

- ✓ Report of the vote -- give number of votes, if counted
- ✓ Announce the prevailing side
- ✓ Declare the motion as adopted or lost
- ✓ Effect of the vote
- ✓ Next order of business

I believe that proper execution of Step 6 is always crucial, but even more important in controversial situations. I explain this in great detail in an article I wrote that was published in the *National Parliamentarian*, the professional journal of the National Association of Parliamentarians, titled “The Presiding Officer’s Impact on Closure to Controversial Decisions.” You can find that article on my website at the following link: [Dave you need to insert here the link to the article I recently sent you]

Above all, effective meeting management by the chair requires the chair to remain impartial throughout the entire process of presiding over a meeting. Admittedly, impartiality is extremely difficult, yet tremendously important. That impartiality must not only be displayed in the words used by the chair, but in facial expressions and body language since they are such an important part of the communication process.

There are times when the chair feels that he/she cannot be impartial. There is an easy answer. Simply remove self from the chair, have the vice chair (or whomever presides in the absence of the chair) take over the processing of the motion. Removal from the chair is not only a figure of speech, but an action that includes getting up from the front of the room and sitting out with the other members. When the chair removes himself/herself from the chair, the chair does not return until the motion has been completely processed.

There is no question the time when impartiality is the hardest is the time when it is needed the most. The chair cannot adequately facilitate an issue from an obviously extreme position. The chair must facilitate from the center because any hint of partiality is perceived by members on the other side as a lack of fairness by the chair. There are many mistakes the chair can make that the assembly will forgive, but one thing they won't forgive is showing obvious partiality in a controversial issue. Presiding officers must stay neutral and should go out of their way to demonstrate neutrality to the members.

A very important strategy in effective meeting management is in the hands of the chair of a meeting. It includes advanced preparation, focusing on the agenda, using all six steps in processing a motion, and remaining impartial. In my next two newsletters I will cover two more important strategies for effective meeting management: facilitating discussion and meeting follow-up.