2016 ABA BAR LEADERSHIP INSTITUTE

PRODUCTIVE, PURPOSEFUL MEETINGS THAT LEAVE PARTICIPANTS ENGAGED AND INSPIRED

- Techniques for Serving as a Successful Chair
- Keeping Participants Focused
- Deftly Facilitating Discussion
- Ensuring Follow-Through
Techniques for Serving as a Successful Chair

- Role of the Meeting Chairman
  - Leader should be a facilitator instead of a dictator
  - Remember, the symbol for a meeting leader is the gavel (justice, fairness), not the crown (royalty)!

- Impartiality of the Chair
  - Leader should be a guide through the meeting
  - Leader should focus on desires of group, not personal desires
  - Leader should remain as impartial as possible during the discussion
  - Must remain impartial throughout the processing of the motion
  - If cannot be impartial, should remove self from chair
  - Time when being impartial is the hardest, is the time it is needed the most
  - Can’t adequately facilitate an issue from an obvious extreme position

- Advance Preparation by the Chair is a Must
  - Most of us don’t respond well to surprises
  - Potentially contentious meetings need extra preparation
  - Review agenda and discuss the “What ifs”

- Regular Meetings Deserve a Preparation Meeting
  - Held regularly before each meeting
  - Attendees: president, CEO, etc.
  - Finalize agenda and attachments to it
  - Prepare motions for meeting on a table including:
    - Agenda item number
    - Wording of motion
    - Maker of motion
    - Action taken

- Share Ownership of the Meeting
  - Contributions to the agenda
  - Share agenda and estimated times for each item
  - Don’t dictate, facilitate!
Agenda
- No agenda, no meeting
- Prepare agenda
- Find method for participants to be involved in agenda preparation
- Agenda should help make purpose of meeting clear to all
- Distribute before the meeting
- Agenda should indicate:
  ♦ Action items
  ♦ Items that have enclosures

Set the Tone
- Positive tone
- Inappropriate behavior needs to be stopped immediately

6 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
Keeping Participants Focused

Focus
- Meeting Chair focuses on process
- Attendees focus on content

Equal Knowledge of the Rules of the Group
- Puts everyone in the meeting on a level playing field
- Some people only learn the rules by violating them
- Research indicates that the rules may not be in writing, but they are there!

Reduce Extraneous Debate The presiding officer can move things along by making any of the following statements:
- "Is there any further discussion on the motion to purchase a computer?"
- "Please limit your discussion to the specific motion, which is to purchase a computer."
- "We've heard many good points of view but are beginning to repeat some of the same ideas. Are there any new opinions on the motion to purchase a computer?" or "Please limit your comments to new opinions."

Focus Attention on One Issue at a Time
- Only one Main Motion
- The debate must be on the specific motion under discussion, not the concept in general
- Discussion should be focused on the issue not the person
- The leader should direct the discussion back to the topic at hand when spontaneous but important ideas creep into the discussion

Focused Issue Discussion
- One person speaks at a time
- Discussion should lead to a conclusion
- No discussion without a purpose
Ownership of the Idea

- After the individual has shared an idea with the group, the idea no longer belongs to the individual but to the group
- The group must make the decision as to what to do with the idea
- The group can change the idea without the originator’s permission
- The leader should thank the person for sharing the idea, giving the person appropriate credit, but then calling upon group members to develop it

Reduce Confusion – Three of the six steps will help keep the meeting moving and keep the confusion out:

- **Step 3: The presiding officer states the motion.** When members know exactly what the motion is before the discussion begins on that motion, they will be much more likely to stay focused
- **Step 5: The presiding officer restates the motion and puts it to a vote.** Being reminded of exactly what the group is voting on right before the vote makes the whole voting process less confusing, especially for the members who were daydreaming
- **Step 6: The presiding officer announces the result of the vote.** When the members know which side prevailed, the implication of the vote, and what the next item of business is, there will be far less confusion.

Complete Announcement of Voting Results

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

- Focus on the Will of the Attendees
  - No crown here!
  - Role is to assist the attendees in reaching their decision
  - The meeting is not all about the leader!

- Facilitate, Don’t Dictate!
  - No crown here either!
  - Chair must be seen as fair
    - Members will forgive mistakes, but not a chair being unfair!
    - Focus on following parliamentary procedure which is based on fairness
  - The group decides the rules, not the chair
  - Make sure everyone is aware of the rules the group will follow

- Keep the Discussion Focused
  - On the specific motion at hand, not the concept in general
  - Focus requires discipline from the chair and attendees
  - Discussion should lead to a conclusion
  - When discussion wonders, redirect ASAP
  - If side issues are raised, offer to put them on the parking lot

- Religiously Follow Speaking Rules:
  - Call on first person who seeks recognition and then others in order of seeking recognition
  - Cases where the chair calls on someone who may not have been the first to seek recognition:
    - If maker of motion has not yet spoken
    - When member has not already spoken on the same motion on the same day
    - Floor assignment should alternate between those favoring and those opposing the question
    - Robert’s limits a members speaking on a motion to 2 times
Ensuring Follow-Through

Meeting Follow-Up

- Begin agenda preparation for next meeting immediately after the current meeting
- Consider templates for agenda, minutes, and motions
- Maintain a spreadsheet of action items and who is responsible
  - Start this list during the meeting and complete it after the meeting.
  - Possible headings for spreadsheet, according to use:
    - Meeting date of action
    - Heading in the minutes
    - Description of action
    - When due, to whom
    - When on future agenda
    - Additional information
    - Status/completed

Meeting Minutes while still Fresh

- Minutes are the official record of an organization
- Minutes are a record of what was done at the meeting, not what was said at the meeting
- Prepare the minutes before the meeting – skeleton minutes
- Use agenda and motion form in preparation
- Fill in skeleton minutes during the meeting
- Complete and distribute to members shortly after the meeting