How to Organize and Run Effective Meetings

By Dr. Carl Stiles

Meetings are necessary to coordinate individual efforts, collaborate on joint projects, garner support for ideas, sell ideas, solve problems collectively, and make consensus-based decisions. Essentially, meetings are a gathering of two or more persons to collectively accomplish what one person cannot. However, not all meetings are really necessary.

Robert’s Rules of Order – Summary Version

Introduction to Robert’s Rules of Order for Fair and Orderly Meetings & Conventions

Motions

A motion is a proposal that the entire membership take action or a stand on an issue. Individual members can:

1. Call to order.
2. Move a motion.
3. Second a motion.
4. Debate motions.
5. Vote on motions.

Basic Types of Motions

- Main Motions introduce items to the membership for their consideration. They cannot be made when any other motion is on the floor, and yield to privileged, subsidiary, and incidental motions.
- Subsidiary Motions change or affect how a main motion is handled, and are voted on before a main motion.
- Privileged Motions bring up urgent items about special or important matters unrelated to pending business.
- Incidental Motions provide a means of questioning procedure concerning other motions and have priority.

Presenting Motions

1. Obtaining the floor
   a. Wait until the last speaker has finished.
   b. Rise and address the Chair by saying, “Mr./Madame Chair, or Mr./Madame President.”
   c. Wait until the Chair recognizes you.

2. Make Your Motion
   a. Speak in a clear and concise manner.
   b. Always state a motion affirmatively. Say, “I move that we ...” rather than, “I move that we do not ...”.
   c. Avoid personalities and stay on your subject.

3. Wait for Someone to Second Your Motion

4. Another member will second your motion or the Chair will call for a second.

5. If there is no second to your motion it is lost.

6. The Chair States Your Motion
   a. The Chair will say, “it has been moved and seconded that we ...” Thus placing your motion before the membership for consideration and action.
   b. The membership then either debates your motion, or may move directly to a vote.
   c. Once your motion is presented to the membership by the Chair it becomes “assembly property”, and cannot be changed by you without the consent of the members.

7. Expanding on Your Motion
   a. The time for you to speak in favor of your motion is at this point in time, rather than at the time you present it.
   b. The mover is always allowed to speak first.
   c. All comments and debate must be directed to the Chair.
   d. Keep to the time limit for speaking that has been established.
   e. The mover may speak again only after other speakers are finished, unless called upon by the Chair.

8. Putting the Question to the Membership
a. The Chair asks, “Are you ready to vote on the question?”
b. If there is no more discussion, a vote is taken.
c. On a motion to move the previous question may be adapted.

Voting on a Motion:
The method of vote on any motion depends on the situation and the by-laws of policy of your organization. There are five methods used to vote by most organizations, they are:

1. By Voice – The Chair asks those in favor to say, “aye”, those opposed to say “no”. Any member may move for an exact count.
2. By Roll Call – Each member answers “yes” or “no” as his name is called. This method is used when a record of each person’s vote is required.
3. By General Consent – When a motion is not likely to be opposed, the Chair says, “if there is no objection ...” The membership shows agreement by their silence, however if one member says, “I object,” the item must be put to a vote.
4. By Division – This is a slight verification of a voice vote. It does not require a count unless the Chair so desires. Members raise their hands or stand.
5. By Ballot – Members write their vote on a slip of paper, this method is used when secrecy is desired.

There are two other motions that are commonly used that relate to voting.

1. Motion to Table – This motion is often used in the attempt to “kill” a motion. The option is always present, however, to “take from the table”, for reconsideration by the membership.
2. Motion to Postpone Indefinitely – This is often used as a means of parliamentary strategy and allows opponents of motion to test their strength without an actual vote being taken. Also, debate is once again open on the main motion.

Parliamentary Procedure is the best way to get things done at your meetings. But, it will only work if you use it properly.

1. Allow motions that are in order.
2. Have members obtain the floor properly.
3. Speak clearly and concisely.
4. Obey the rules of debate.

Most importantly, **BE COURTEOUS**.

Quick Chart of Motions

Part 1. **Main Motions.** These motions are listed in order of precedence. A motion can be introduced if it is higher on the chart than the pending motion.

§ indicates the section from Robert’s Rules.

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<tbody>
<tr>
<td>§21</td>
<td>Close meeting</td>
<td>I move to adjourn</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§20</td>
<td>Take break</td>
<td>I move to recess for ...</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§19</td>
<td>Register complaint</td>
<td>I rise to a question of privilege</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§18</td>
<td>Make follow agenda</td>
<td>I call for the orders of the day</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§17</td>
<td>Lay aside temporarily</td>
<td>I move to lay the question on the table</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§16</td>
<td>Close debate</td>
<td>I move the previous question</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§15</td>
<td>Limit or extend debate</td>
<td>I move that debate be limited to ...</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>2/3</td>
</tr>
<tr>
<td>§14</td>
<td>Postpone to a certain time</td>
<td>I move to postpone the motion to ...</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
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Part 2. Incidental Motions. No order of precedence. These motions arise incidentally and are decided immediately.

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<tbody>
<tr>
<td>§23</td>
<td>Enforce rules</td>
<td>Point of Order</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§24</td>
<td>Submit matter to assembly</td>
<td>I appeal from the decision of the Chair</td>
<td>Yes</td>
<td>Yes</td>
<td>Varies</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§25</td>
<td>Suspend rules</td>
<td>I move to suspend the rules</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§26</td>
<td>Avoid main motion altogether</td>
<td>I object to the consideration of the question</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§27</td>
<td>Divide motion</td>
<td>I move to divide the question</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§29</td>
<td>Demand a rising vote</td>
<td>I move for a rising vote</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§33</td>
<td>Parliamentary law question</td>
<td>Parliamentary inquiry</td>
<td>Yes if urgent</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§33</td>
<td>Request for information</td>
<td>Point of information</td>
<td>Yes if urgent</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
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</table>

Part 3. Part 3, Motions That Bring a Question Again Before the Assembly. No order of precedence. Introduce only when nothing else is pending.

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<tbody>
<tr>
<td>§34</td>
<td>Take matter from table</td>
<td>I move to take from the table ...</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§35</td>
<td>Cancel previous action</td>
<td>I move to rescind ...</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>2/3 or Majority with notice</td>
</tr>
<tr>
<td>§37</td>
<td>Reconsider motion</td>
<td>I move to reconsider ...</td>
<td>No</td>
<td>Yes</td>
<td>Varies</td>
<td>No</td>
<td>Majority</td>
</tr>
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Provides common rules and procedures for deliberation and debate in order to place the whole membership on the same footing and speaking the same language. The conduct of ALL business is controlled by the general will of the whole membership – the right of the deliberate majority to decide. Complementary is the right of at least a strong minority to require the majority to be deliberate – to act according to its considered judgment AFTER a full and fair “working through” of the issues involved. Robert’s Rules provides for constructive and democratic meetings, to help, not hinder, the business of the assembly. Under no circumstances should “undue strictness” be allowed to intimidate members or limit full participation.

The fundamental right of deliberative assemblies requires all questions to be thoroughly discussed before taking action.

The assembly rules – they have the final say on everything. Silence means consent.
• Obtain the floor (the right to speak) by being the first to stand when the person speaking has finished; state Mr./Madam Chair. Raising your hand means nothing, and standing while another has the floor is out of order. Must be recognized by the Chair before speaking.

• Debate cannot begin until the Chair has stated the motion or resolution and asked “are you ready for the question?” If no one rises, the Chair calls for the vote.

• Before the motion is stated by the Chair (the question) members may suggest modification of the motion; the mover can modify as they please, or even withdraw the motion without consent of the seconder; if mover modifies, the seconder can withdraw the second.

• The “immediately pending question” is the last question stated by the Chair. Motion/Resolution – Amendment – Motion to Postpone

• The member moving the “immediately pending question” is entitled to preference to the floor.

• No member can speak twice to the same issue until everyone else wishing to speak has spoken to it once.

• All remarks must be directed to the Chair. Remarks must be courteous in language and deportment – avoid all personalities, never allude to others by name or to motives.

• The agenda and all committee reports are merely recommendations. When presented to the assembly and the question is stated, debate begins and changes occur.

The Rules

• Point of Privilege: Pertains to noise, personal comfort, etc. – may interrupt only if necessary.

• Parliamentary Inquiry: Inquire as to the correct motion – to accomplish a desired result, or raise a point of order

• Point of Information: Generally, applies to information desired from the speaker: “I should like to ask the (speaker) a question.”

• Orders of the Day (Agenda): A call to adhere to the agenda (a deviation from the agenda requires Suspending the Rules)

• Point of Order: Infraction of the rules, or improper decorum in speaking. Must be raised immediately after the error is made

• Main Motion: Brings new business (the next item on the agenda) before the assembly

• Divide the Question: Divides a motion into two or more separate motions (must be able to stand on their own)

• Consider by Paragraph: Adoption of paper is held until all paragraphs are debated and amended and entire paper is satisfactory; after all paragraphs are considered, the entire paper is then open to amendment, and paragraphs may be further amended. Any Preamble cannot be considered until debate on the body of the paper has ceased.

• Amend: Inserting or striking out words or paragraphs, or substituting whole paragraphs or resolutions

• Withdraw/Modify Motion: Applies only after question is stated; mover can accept an amendment without obtaining the floor

• Commit/Refer/Recommit to Committee: State the committee to receive the question or resolution; if no committee exists include size of committee desired and method of selecting the members (election or appointment).

• Extend Debate: Applies only to the immediately pending question; extends until a certain time or for a certain period of time

• Limit Debate: Closing debate at a certain time, or limiting to a certain period of time

• Postpone to a Certain Time: State the time the motion or agenda item will be resumed

• Object to Consideration: Objection must be stated before discussion or another motion is stated

• Lay on the Table: Temporarily suspends further consideration/action on pending question; may be made after motion to close debate has carried or is pending

• Take from the Table: Resumes consideration of item previously “laid on the table” – state the motion to take from the table

• Reconsider: Can be made only by one on the prevailing side who has changed position or view

• Postpone Indefinitely: Kills the question/resolution for this session – exception: the motion to reconsider can be made this session

• Previous Question: Closes debate if successful – may be moved to “Close Debate” if preferred

• Informal Consideration: Move that the assembly go into “Committee of the Whole” – informal debate as if in committee; this committee may limit number or length of speeches or close debate by other means by a 2/3 vote. All votes, however, are formal.

• Appeal Decision of the Chair: Appeal for the assembly to decide – must be made before other business is resumed; NOT debatable if relates to decorum, violation of rules or order of business

• Suspend the Rules: Allows a violation of the assembly’s own rules (except Constitution); the object of the suspension must be specified
Decide If You Need to Have a Meeting

Many meetings do not need to be held, and often those that are held are attended by more people than necessary. Often times there are more efficient ways to “meet” your objectives without holding a meeting. Some of these alternatives include: phone calls, conference calls, memos/letters, postal mail, e-mails, teleconferencing, and list serves.

First, one needs to decide if a meeting is necessary. Before scheduling or attending your next meeting, clearly define the objectives for yourself or the group if you are the person responsible for the meeting. To help you think through your objectives, ask yourself the following four questions:

- Why am I scheduling or attending this meeting?
- What do I want to accomplish or gain?
- What information will be exchanged or decisions made?

Who will be attending that I need to meet or gain their support?

Once you have clarified your objectives, you still need to determine if a meeting is the best way to reach them. To make sure a meeting will be the best use of time and energy for all concerned, determine if it will be used for at least one of the following reasons:

- To convey information to a group
- To solicit information from a group
- To answers questions
- To participate in group decision making
- To brainstorm ideas
- To solve problems
- To network
- To sell an idea, product, or service
- To show or provide support for others

If you have determined a meeting is the best avenue to carry out your team’s objective, then you should begin to organize for an effective meeting.

How to Organize for A Meeting

Good meetings are not accidents – they are the result of good planning. The time you spend before will result in major benefits later by efficiently using the meeting time, accomplishing objectives, and avoiding the need for follow-up meetings. When deciding to hold a meeting, you should also decide who should attend and what is the purpose of the meeting. To help in planning meetings, below is a checklist of major elements essential for meeting effectiveness.

**Purpose**

- Plan meetings with purpose. Define the purpose or objective of the meeting (e.g., to reach consensus on how volunteer leaders should allocate their time).

**Participant**

- Who needs to attend this meeting to accomplish the purpose?

**Structure**

- How should the meeting be organized to best accomplish the purpose? Some techniques may include: guest speakers, videos, brainstorming sessions, panel sessions, discussion groups, demonstrations, etc. Whatever technique is selected; it should have the greatest impact on the participants to attain the meeting objective.

**Location and Time**

- Select a meeting place that best matches the participant’s needs, the objective, and the meeting structure. When planning where to meet, give consideration to size, comfort, accessibility, adequate parking, room acoustics, equipment needs, etc. Choosing a meeting time depends on the availability of participants and meeting facilities. The anticipated length of the meeting should also be a factor in deciding when to schedule the meeting.

**Agenda**

- A meeting agenda should be prepared and distributed to participants at least three days prior to the meeting day. An agenda is crucial to meeting success in three ways:
1) it clarifies the objectives so people understand the meeting purpose and tasks;
2) distributing the agenda prior to the meeting helps participants plan and prepare to make an effective contribution; and
3) during the meeting, the agenda provides direction and focus for the discussion.

There are a variety of agenda styles but essentially they should contain at least the following elements: title (e.g., evaluation review meeting), time (e.g. 8:00-10:00 a.m.) date, location, discussion items, and names of persons responsible for covering each item. Some people prefer to include time allotments for each agenda item to improve meeting effectiveness (e.g. review minutes 1:05-1:10).

Responsibilities

- There should be a mutual understanding of not only the meeting purpose, but also individual assignments and how they fit into the total program. Those meetings that are more focused on brainstorming or creativity may require little or no individual assignments. In task-oriented or policy deciding meetings, it is best to prepare a written summary of assigned duties so individuals know what their responsibility is for the meeting.

Confirmation

- If it is a first meeting or if the meeting is on a new day or time, individually contact all participants a week to three days before the meeting day. Contact can be as simple as sending everyone a friendly reminder through office e-mail, phone calls, or a post card reminder through the mail. For regularly scheduled meetings, choose a location and meeting time and try not to change it.

Planning does take a certain amount of time, however the burden of planning does not have to fall fully on the leader's shoulders. The leader is responsible for seeing that the planning gets done, not necessarily for doing it. Every step can be delegated. If you are responsible for conducting the meeting and you chose to delegate the tasks of organizing the meeting, make sure you are familiar with the agenda, objectives, and any relevant background information before the meeting begins.

How to Run Effective Meetings

The meeting leader or facilitator is responsible for setting the meeting tone, keeping the discussion on track, and making sure everyone has a fair chance of being heard. The leader or facilitator should also summarize relevant points and tie things together when the discussion jumps around between interrelated topics.

Filling the role of leader or facilitator is no easy task, especially when personal agendas clash or misunderstandings occur. Although a well-planned meeting will significantly reduce surprises and meeting confusion, there is no guarantee everything will run smoothly, even with the best planning. Here are some suggested guidelines on how to run effective meetings:

Begin On Time and End On Time

- If you begin a meeting five to seven minutes after it was scheduled, you are starting late. Starting a meeting late sends the message that it is okay to be late and it shows a lack of respect and appreciation for those who make the effort to arrive on time. Some people may have back-to-back meetings. Ending on time shows respect for participants' valuable time. However, no one ever complains if you are fortunate enough to end early.

Use the Agenda

- Review the agenda with participants at the beginning of the meeting and ask them if any changes need to be made on time allocations or discussion content. Continually refer back to the agenda throughout the meeting to keep discussion centered on the stated purpose and specified agenda items. Post the agenda on an easel pad and tape it to the wall, this way everyone can refer to the agenda when discussion seems to be getting off track.

Use an Ideas Bin

- A “bin” consists of blank sheets (one or two) torn from an easel pad and taped to the wall. Any idea that is unrelated to the current topic is written on the easel pad paper (i.e., placed in the bin). The bin serves two valuable purposes:
  1) it stores valuable ideas for consideration at an appropriate and convenient time, and
  2) it allows discussion to stay focused on the agenda topic.

Using the bin is an effective way to keep discussion focused and it helps people hold onto their thoughts and ideas without being disruptive to the meeting. Explain the use of the bin at the beginning of the meeting. During the meeting the team leader or the facilitator should record bin items as they come up, or participants should record their own bin items when they feel discussion is getting off track.
Establish and Use Ground Rules

- Ground rules are explicit rules that the group agrees to follow to help them facilitate productive discussions. Whether the group formulates the ground rules or the meeting leader/facilitator presents them, all group members should reach consensus on following the ground rules. The ground rules should be written down on easel pad paper and taped to the wall for everyone to see. Ground rules lay out the expectations of “the way things should be done at meetings.” Ground rules are used to facilitate group interaction, not to restrict it. The group can change the ground rules or add new ones based on group needs.

Examples of some typically used ground rules include: arrive and start on time; stick to the agenda; everyone participates; be realistic when accepting follow-up tasks; focus on interests, not positions; separate people from the problem; respect different viewpoints; share responsibility for following the ground rules.

Control Dominating Individuals

- Make sure each individual has a fair chance of expressing ideas and opinions. Do not let one person dominate the discussion. Of equal importance is to ensure that quiet participants are expressing their ideas and opinions. This may require the leader or facilitator to directly call on the quiet member and ask them for their opinion or for any ideas they would like to share.

Bring Food

- Food energizes and motivates people more effectively than any other meeting tactic. Although many people still prefer the standard coffee and donuts, alternatives such as fruit, juice, and bran muffins can be provided. For afternoon meetings, cookies, hard candy, fruit, and cheese are several suggestions.

Summarize

- Conclude the meeting by summarizing the discussion, decisions made, tasks delegated, deadlines, and any action required by participants. Depending on the time available, either address bin items or place them on the agenda for the next meeting. Include in the summary any review plans for follow-up or the need to schedule any succeeding meetings. It is far easier to schedule the next meeting while everyone is at the table than it is to wait and contact each participant individually.

The responsibility for the success and effectiveness of the meeting ultimately rests equally with everyone in the group. A well-planned agenda, posted ground rules, and using a bin are the three most important keys to running effective meetings. Meetings can be fun and productive. It is easy to get caught up in the pressure of the meeting and lose sight of perspectives. Stress diminishes creativity and spontaneity and generally lowers the quality of results achieved by the group. So relax and remember that the best results come from groups who are able to laugh together, discuss their mistakes, and take pride in their efforts.