

Some Notes to help with Robert's Rules of Order

Roberts Rules—used by organizations from the US congress to the Boy Scouts and Girl Scouts. Some version of Roberts Rules are used by all effective organizations. So let's take a look at Roberts Rules of order. The reason that we use Roberts Rules of Order for business meetings is:

- A. Roberts Rules (hereafter to be abbreviated RR for the purposes of this document) allows us to make the most efficient and effective use of time in our meetings. Some research indicates that a meeting that goes over one hour gets less and less effective.
- B. By running an effective/efficient meeting you get the business accomplished smoothly.
- C. RR provides structure by setting up the rules ahead of time.
- D. Meetings run most efficiently when everyone there knows the rules but it is up to the *chairperson* to make sure that the group knows what the rules are and that we use them. To do that you, as leaders have to know the rules and run the meeting accordingly.
- E. Without structure meetings become chaotic and nothing gets done.

So let's look at the structure and what is necessary to run a smooth efficient and effective meeting:

- A. There must be coordination and **leadership-- a Chairperson** to lead the meeting.
- B. Everyone has to know what will be covered in the meeting therefore **an "agenda" is required** and preferably everyone sees it before the meeting. In many cases, although the agenda is put together and circulated by one person, it often has input from the group ahead of time.
- C. **It is the chairpersons job to "run" or facilitate the meeting and coordinate the structure.**

There are some "rules" for that chairperson. For example, it is important that **to get to talk you have to be recognized by the Chairperson**. Standing when you have something to contribute and waiting to be acknowledged by the Chair is essential to an organized, well run meeting. **You must wait to stand until the person speaking is finished**. This rule allows us to avoid a situation where everyone is talking at once. When this happens the meeting comes to a halt and no further business gets done. It is also important that **everyone has a chance to contribute or "be heard"**—within reason, and no one person dominates the meeting and this includes the chairperson. The Chair's responsibility is to coordinate the meeting so the rules are followed and business gets done in a timely way. The Chair makes sure that everyone attending the meeting is valued and treated with respect. Healthy discussion is encouraged, no one gets trashed in the process and the focus always comes back to the business at hand. **(That's where importance of a vision for the group comes in and why Robert Rules Of Order are used)**.

- D. The chairperson keeps the meeting moving utilizing Roberts Rules (RR) and moving through the business at hand, by **focusing on the agenda**.

AGENDAS: A prioritized list of topics for the meeting. Keep them simple, doable, and prioritize so that the most important material can be covered first in the time allowed.

PRIORITIES: What are priorities? What is most important to the group and must be accomplished at this meeting? How does one prioritize? Ask the questions what do we have to accomplish here? Are there decisions to be made? Is there a time factor? Do we need to take “official” actions? (a vote). If in doubt go back to the vision—what we are all about? We all prioritize every minute of our lives but we don’t necessarily think of our prioritizing that way. If we didn’t we’d never get through our days. We do it at work, at home and socially. Are there agenda items that have a time frame? Put the important things at the top of the agenda.

ROLES: Most organizations have a chairperson, vice chairperson, secretary, and treasurer (or combination secretary-treasurer.)

FUNCTIONS:

Chairperson runs the meeting and keeps things “on task”. One good strategy is to refocus the group if things start getting far afield by referring back to the agenda and task at hand. “Ok, we’ve wandered a bit—where are we? Let’s get back to...” The Chairperson does not have to do everything himself or herself there is a lot of value in **delegation**.

Vice Chairperson, takes over if the Chairperson is unable to attend, supports the Chairperson, sometimes becomes the chairperson the next year and may be delegated special task or projects to coordinate.

Secretary takes notes and writes up the minutes of what happened at the meeting and the decision that were made. By using the same format as the agenda the minutes have an order and are always written up the same way. Minutes need to be concise. The secretary reads the minutes of the previous meeting and makes corrections if necessary.

Treasurer takes care of the financial business and gives a report of the finances at each meeting. It is only necessary to give information in three areas, income, outgo and current financial status—or Bottom Line.

MINUTES: Minutes are taken so that there is an official record of the meeting. They also prevent issues and tasks from falling through the cracks, getting lost or forgotten. They provide continuity for the next meeting—the group doesn’t have to re-create the wheel each time and the business flows from one meeting to the next. The format for the minutes is the same as for the meeting and so the structure helps the secretary keep organized minutes.

FORMAT:

1. Flag salute, prayer or whatever is appropriate for your group
2. **Introductions** if people don’t know each other.

3. Make sure **everyone has a copy of the agenda and the minutes of the last meeting** (preferably ahead of time if possible). All attendees should know what will be covered in the meeting.
4. **Calling the meeting to order**, the Chair taps the gavel and says **"I call the meeting to order."**
- *5. Reading of the last meeting minutes, "The secretary will now read the minutes"** Approval of the minutes is an official action: The Chairman says **"are there any additions or corrections to the minutes?"**—If there are, the secretary makes the corrections in the minutes, if not then the chair says **"may I have a motion to approve the minutes as read?" (or as corrected)** someone makes a motion, **"I move that we approve the minutes as read (or corrected)"** Chair says **"may I have a second"** someone in the group says **"I second"** or **"I second that motion"** and the chair says, **"it has been moved and seconded that we accept the minutes of the last meeting, all in favor say aye"** the Chair says **"opposed say nay"** and a vote is taken. The chair then says **"the minutes are approved as read"** If there are corrections the chair says **"The minutes are approved as corrected"**. For most groups the minutes are a legal record of the organizations proceedings and as such must have a formal vote and approval to accept them either as read or as corrected. ***This is very important and it is a good way to remember the voting procedure and language by doing it at the beginning of every meeting for the minutes. You may be using the same language as you conduct other business in the course of the meetings.**
6. **Treasurers Report.** The chairperson says **"may I have the treasurer's report."** A formal motion and vote is not necessary for the chairperson to accept a treasurers report. The report is generally given orally and the written report is given to the secretary so that the information can be included in the minutes.
7. **Committee reports.** These are merely reported and do not need a vote to approve. However a short version should be entered in the minutes.
8. **Unfinished business** (preferable to "old business") Chairperson says, **"Is there any unfinished business?"** Discuss unfinished business. Decide how and when to finish it.
9. **New business: "Is there any new business?"** This is the time to bring up and discuss new business.
10. Chairperson makes a request for any further new business, if not **continue with the agenda.**
11. **Recap Tasks/reports to be done and time frames before the next meeting**, is everybody clear on who is doing what and by when?
12. **Decide on the Date and place of the next meeting**
13. **Adjourn the meeting. "This meeting is adjourned" gavel tap.**

MOTIONS, SECONDS, DISCUSSION AND VOTING: There are times when decisions need to be formally adopted by the group and recorded in the minutes. This same format is used each time as is the same language. If the Chairperson thinks that there needs to be official action to take action during the meeting he or she would then ask for a motion to do so. It is perfectly acceptable to pose

the question—do we need a motion on this? I would suggest that each group have the book Roberts Rules of Order. Rule of thumb: If it is official business or has legal ramification you do need a motion and a vote. **“May I have a motion to (accept the minutes of the last meeting”, for example.)** A member says, **“I move we accept the minutes”,** the chair then says, **“do I have a second”** and someone in the group seconds the motion by saying **“I second the motion”** The chair says **“It has been moved and seconded that we accept the minutes, is there any discussion?”** This is then the time for questions and discussion from the group. **The chairpersons job is to keep the group on task and not let it get off onto non-related topics.** When the discussion winds down the chairperson says **“If there is no further discussion it has been moved and seconded that we accept the motion to... all in favor say yes (or aye”), “opposed say No (or Nay)”** The Chairperson says **“The motion passes (or fails to pass)”**. It’s always nice to thank the secretary, treasure and committee heads after their reports have been accepted.

Recap on motions: So, the format for any official action is to **take a vote**. That involves: The Chair asking for a motion **“May I have a motion?”** Someone making the motion by saying **“I move that....(repeat the motion)”**, Chair says, **“May I have a second?”** Someone else says **“I second the motion”** The chair provides time for an open discussion of the motions on that topic by saying **“is there any discussion?”** This is the time for clarification of the issue or correction to insure that the motion reflects accurately what you want to do. Be sure to allow for everyone to be heard and to look at all sides of the issue so that everyone has the same understanding of what they will be voting on. When the issue has been discussed either the Chairperson or anyone in the group can call for the vote by saying. **“I call for the question”** and a vote will be taken at this time. Usually the Chairperson uses the same wording and says: **“It has been moved and seconded that we.....All in favor say yes (or aye)”**—take the count. **“All opposed say no (or the traditional nay”)** Then the Chairperson says **“The motion to..... is approved (or is not approved”)** The meeting moves on to the next topic at this point. The Secretary can record this transaction by putting the letters MSP in the minutes. For example, “it was **Moved** by (name of the person who made the motion, **Seconded** (seconds do not need to be named in the minutes) and **Passed** that we....” Courtesy is important because sometimes discussions can get very enthusiastic or even rather heated. This is why a gavel can be helpful. It is the Chairpersons job to maintain order during the meeting. This brings us to our next topic.

HOW TO KEEP DISCUSSIONS ON TRACK-- OR DEALING WITH DISTRACTIONS, OFF TOPIC DISCUSSIONS, PRIVATE CONVERSATIONS AND FILIBUSTERS.

Fake it till you make it! None of us is born knowing how to run a meeting. Most of us are self-conscious or uncomfortable the first couple of times. That will disappear fast. We all have to learn and practice this skill and you are allowed to make mistakes. Meetings can be informal and fun and still have structure. Sometimes there are difficult situations and there are ways to manage these situations given the words and tactics to use. For the most part people are polite and business-like given a clear understanding of the rules and procedures for a business meeting but you may very occasionally run into some of the following situation. You are not alone.

In the U.S Congress a tactic is used to delay or prevent action on an item. It's called a filibuster. It means that someone will talk endlessly until they drop—about anything just to keep talking and not let anyone else “be recognized” by the Chairperson and “have the floor” which means they can't talk until the person talking is finished. The intent is to stop *anything* from happening. This is an extreme political tactic intended to delay any action on a bill and not appropriate in business meetings. However we all know folks who love the sound of their own voices and have a habit of taking over “the floor”. There are specific tactics to use if someone gets very long-winded and slows down or stops the meeting. One tactic the Chairperson can use is to politely interrupt by saying “thank you for your ideas and thoughts and we have several other agenda items to get to so can we table this for right now.” Or you can say “we're running out of time for this topic. Let's all think about what Jane has said and perhaps get it on the agenda for the next meeting.” This needs to be done with sensitivity and a respect for the person speaking. You sometimes have to be firm.

Occasionally two or three people will start a conversation of their own. This makes it difficult for the rest of the attendees to hear and is distracting for the group. It's rude but it happens. Sometimes it is enough for the Chairperson to stop talking and look directly at the people carrying on a private conversation. Raising your eyebrows at the same time helps. Or, you can ask if they have something they would like to share with the group (or have a question) or you can tap the gavel and say that **“we need to refocus on the business at hand.”** It may be necessary to talk with those folks after the meeting, nicely and say that you had trouble focusing on the meeting when there was another conversation happening. Have this conversation with them only if it is a pattern of behavior and is causing difficulty for other members. Often the group itself will take care of this. The Chairperson's job is to make sure that everyone can participate and this is difficult to do when there is the distraction of a private conversation. It may be appropriate to actually say this during the meeting but you can do it with sensitivity and tact. Sometimes you may just have to “wing it” and do the best you can.

ENGAGING OTHER PARENTS

Successful organizations enroll, align and attract people to them. Leaders of these organizations must know not only how to recruit and **delegate** but how to reward and maintain the interest of the members who volunteer to participate.

One of the best tools is for members to get to know each other. That way they can work together to successfully carry out the mission and vision of the organization. It needs to be fun! Any task can be enjoyable if the people doing it can laugh together and work side by side. It is terrifically important to acknowledge the efforts and contributions no matter how small or large. "Thank you, you did a good job with that" can go a very long way.

In many cases people are just waiting to be given a small job and a team to work with. It's a good way to get to know the other member of the organization. Delegate delegate delegate! All members of the organization work together better when the task is set clearly before them and they have an idea of what the finished product might look like.

Leaders need to be cheerleaders and coaches as well. Check in to see how the project is going, does the team need anything and a celebration of progress. At the conclusion the group needs to celebrate their efforts. Celebration and recognition for a job finished and/or well done makes all of us want to do more.

Although everyone needs to participate in this process the Chairperson sets the example for how the members of the team are treated. You are the role models. Gratitude is a good thing when it comes to encouraging and engaging others in the implementation of the vision.