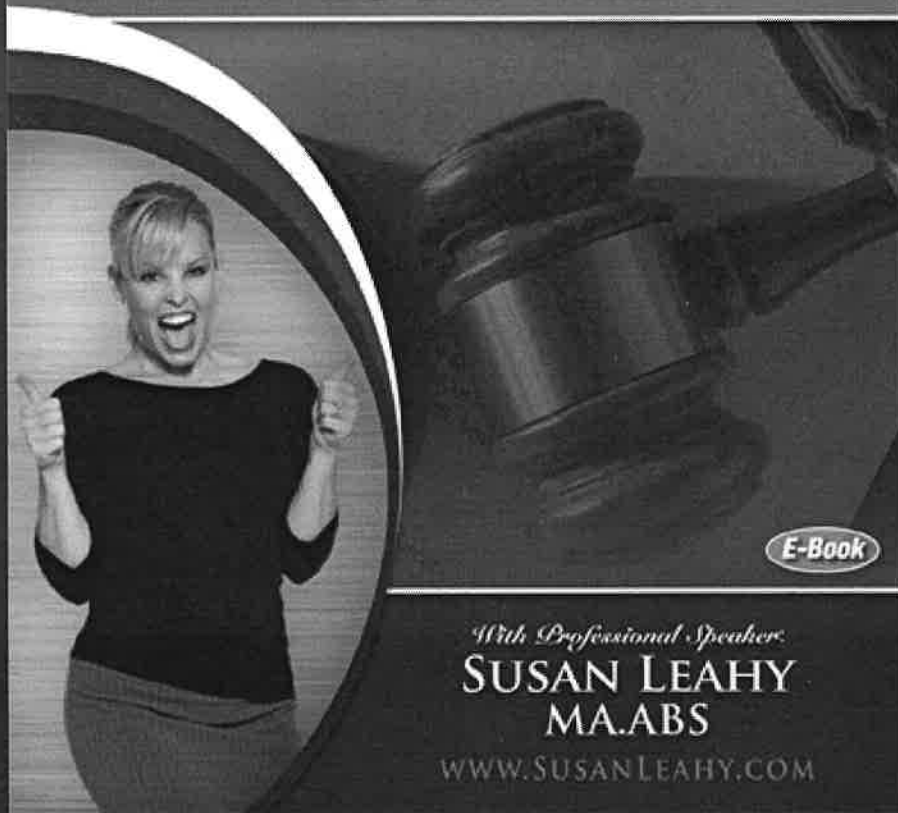


CHAIR A MEETING WITH CONFIDENCE:

“KNOW WHAT
TO SAY WHEN”



With Professional Speaker:
SUSAN LEAHY
MA.ABS

WWW.SUSANLEAHY.COM

The “Chair a Meeting with Confidence” eBook by Susan Leahy is one component of the **ROBERT’S RULES MADE SIMPLE SOLUTION**, the nation’s leading Robert’s Rules of Order education resource.

For more information about the **ROBERT’S RULES MADE SIMPLE SOLUTION**, visit:

WWW.ROBERTSRULESMADESIMPLE.COM

All rights reserved
©2013 D.I.A. Productions, Inc.

Chair a Meeting With Confidence

TABLE OF CONTENTS

Introduction	1
Section One The Mindset of a Confident Chair	3
Section Two What to Say When...	7
Section Three Meeting Evaluation	18
Conclusion	21

ABOUT THE AUTHOR

Susan Leahy, MA is a Motivational Speaker and the co-creator of RobertsRulesMadeSimple.com. Susan's work focuses on turning groups into TEAMS through running better meetings and increasing communication to drive results. Susan conducts keynotes, workshops, and full-day retreats for her clients across the country. Susan resides in Los Angeles California with her two young children and her husband Jared.



**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Does the idea of chairing a meeting make your stomach churn? Do you worry you aren't going to know what to say when a difficult situation arises? Do you fear that things are going to get out of control or that people aren't going to listen to you?

My name is Susan Leahy, and I want to welcome you to **Chair a Meeting With Confidence, Know What to Say When**. This eBook is full of practical tips and techniques that will show you how to be an effective chair, as well as arm you with pre-written scripts that you can use the next time you chair a meeting.

There are few things more rewarding than a meeting where work actually gets done. But many times, it can seem that meetings only waste time, and people leave feeling frustrated & de-motivated.

Whether your meetings are formal and use Robert's Rule of Order, or informal. The chair has the single largest impact on the success or failure of that meeting.

This eBook is designed to give you practical training that will support you being an effective chair. This eBook can be used by itself or with my "Robert's Rules Made Simple" instructional DVD and my "Confident Public Speaking" audio training. All of which can be found at my website, www.RobertsRulesMadeSimple.com

It is my desire that this eBook will provide you with the practical tools that you are looking for to give you more confidence the next time you have to chair a meeting. Good luck!

Chair A Meeting With Confidence

WHAT THIS EBOOK COVERS

This eBook is separated into 3 Sections.

Section 1 addresses the “Mindset of a Confident Chair”. This section discusses why being an effective chair can be so challenging, and it gives you insight about what an effective chair is thinking when they are running a meeting. The goal of this section is to give you tips on how to start thinking like a confident chair.

Section 2 will feature my popular “What to Say When” examples. As a professional presenter who works with groups across the nation, one of the most popular questions people ask me is, “Susan, what do I say when...?”

I am providing you with over 30 “What to Say When” scripts that you can use during your next meeting. The scripts include examples of what to say when...

- You start the meeting
- There are side conversations
- People are texting or talking on their cell phones
- The same people keep talking
- People are arriving late or leaving early from the meeting
- People are speaking off topic
- People are not voting, or too many are abstaining
- People make personal attacks
- Someone cries or has an emotional outburst
- Someone jokes in an inappropriate way
- People are not participating

- You get lost or forget where you are on the agenda
 - People are interrupting one another
 - People are not using parliamentary procedure correctly
 - The debate drags on and on
 - You want to end the meeting
- & much more!

Finally, Section 3 covers how to improve your meetings. A great and under-utilized tool for running effective meetings is a “Meeting Evaluation Checklist”. This is an evaluation that you can do with your members to learn how to run your meetings more effectively. The evaluation, provided in this book, can be used at your next meeting to determine what you are doing well and what improvements still need to be made.

Being an effective chair is easier said than done. But believe me, it is a skill that will support you in attaining a higher level of both professional and personal success. I once heard that the average working professional spends about 36 hours per month in meetings, and it is thought that over half of that time is wasted. A big reason so much time is wasted is because of having an ineffective chair. People don't have time to waste, so if you can become an effective chair that doesn't waste people's time, people will not only want to come to your meetings, they will respect and admire you as a leader.

People want to be part of meetings where work actually gets done. Make it your goal to be the type of chair that makes that possible.

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Chair A Meeting With Confidence

SECTION ONE:

THE MINDSET OF A CONFIDENT CHAIR

What should your mindset be when running or chairing a meeting?

First, it needs to be understood that being the chair comes with a certain amount of power, and when that power is misused, as it often is, groups can be torn apart and progress can be stalled.

As you may or may not know, my work centers around turning groups into TEAMS. I do this by helping my clients run better meetings, improve their interpersonal communications to drive results. This eBook is meant for those chairs that want to use their power for the good of the TEAM. If you have any other intention, I ask you to stop reading, as this Ebook is NOT for you! This information is not just meant to make you look good, give you more power, or to play into your ego. It is to support the success of the entire TEAM.

If you desire to be a chair that wants to support the success of your team by running effective meetings where work gets done & people feel respected, then I invite you to keep reading.

It is the responsibility of the chair to create a safe space for people to get involved. A space in which the voices of both the majority and minority can openly share with the intent of getting work done. Your mindset has to focus on creating that type of safe meeting space.

Human beings are interesting creatures, and if humans don't feel safe, they protect themselves and become defensive. Creating a safe meeting environment will help each member of your meeting feel more confident, encouraging them to speak up and get involved in a way that is

productive, not destructive. When people participate from a defensive space, it is almost virtually impossible to get work done. But when people feel safe, they are willing to share more of themselves, which fosters greater creativity and leads to better results. As a chair, you need to constantly be asking yourself, **“Am I creating a safe space for people to get involved?”**

There is something interesting about being a chair that a lot of people don't think about. You see, if you don't lead with the TEAM as your focus then over the long term you will begin to lose your credibility as a leader. The people are the most important part of the process! An effective chair supports team members by using a process (such as Robert's Rules of Order) which helps create a safe space where work gets done!

Having a process for making business decisions helps the TEAM feel safer because they know the rules of engagement and how to interact. If you are a new chair, you need to educate yourself on the process that the organization uses. Robert's Rules of Order is a formal process that many organizations use to run their meetings. If your organization uses Robert's Rules of Order, and if as a new chair you haven't used this process, then you must prepare yourself before the meeting. Study before the meeting, don't wing it. Find resources to support you. I suggest using videos or podcasts. Most people tend to be visual learners and can learn faster when they see an example instead of just reading it from a book. That is exactly why I created my instructional DVD, **“Robert's Rules Made Simple.”** Instructional DVDs allow you to see examples of what you can actually do when you are running the meeting.

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Chair A Meeting With Confidence

WHY IS BEING A CHAIR SO DIFFICULT?

The truth is that being a chair is a complex responsibility that can keep even the most skilled facilitators on their toes.

Process & People Management

When you are chairing a meeting, there are two different things that I want you to focus your attention on.

#1. Process Management

How business decisions made and work gets done

#2. People Management

Meeting the needs of the people in the meeting to get work done

One thing I want you to remember is: **don't make the process more important than the people.**

While process management & people management are both essential to getting work done and building the integrity of the team, keep in mind that people are more important than the process. However, having a strongly defined process supports people in feeling safe so they can get involved and participate productively when conducting and handling business.

So let's break this down a little further into examples of (1) process and (2) people management questions.

What are examples of process management questions that you, as a chair, should be asking yourself?

- Are we starting on time?
- Are we using Robert's Rules of Order properly?
- Are we following the agenda?
- Do we have the proper technology in the room to support a successful meeting?
- Are we moving through the agenda in a timely manner?
- Do we need to speed up or slow things down so that we can get to each item of business?
- Is this a productive use of our time?

What are examples of people management questions that I, as a chair, should be asking myself?

- Does everyone look like they understand?
- What is the emotional atmosphere of the room?
- Is everyone participating?
- Are people feeling comfortable enough to get involved?
- Is it too hot or too cold for people?
- Do people need a bathroom break?
- Am I using everyone's time wisely?
- Are we getting our work done as a TEAM?

Effective chairs are able to manage both the process and the people. Think about it. Have you ever seen a chair that is all about process and doesn't care about the people? What happens? This chair inevitably creates frustration and resentment.

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Chair A Meeting With Confidence

Or how about the chair that is very concerned about people but has no focus on the process? These meetings have no structure and seem to go nowhere.

When people don't understand the process of how to participate productively in a meeting frustration and resentment can also be created.

As an effective chair you need to be thinking about both the process management of the meeting as well as the people management of the meeting at the same time. Balancing these two elements is key.

QUICK NOTES:

The Mindset of a Confident Chair

- Focus on building TEAM**
- Create a safe space for people to get involved**
- Understand your organization's process for running meetings**
- Think (1) Process Management & (2) People Management**

NERVE MANAGEMENT

So as a chair, you now understand the difference between people management and process management. But there's something else that has to be managed: Your nerves.

Nerve management is a big one, especially for new chairs. Many of the chairs that I work with are so nervous when they walk into a meeting it is almost impossible to think about the process or the people. All they can pay attention to is how nervous they feel.

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Being nervous is normal. In fact, nerves never go away and in my opinion you don't want them to. Feeling nervous is a part of the process. To be completely honest, I still get nervous every time I chair a meeting.

While much of your nervous energy manifests in the body we need to understand that nervousness starts in your mindset. When running a meeting are your thoughts working for you or against you? Take a moment to get in touch with your thoughts? What are your fears? What do you worry is going to happen when you are chairing? Are you:

- Afraid you won't know what to say?
- You will get lost?
- People will be judging you?

Whatever your thought is, you need to hear it so you can start to manage it. Here is a very easy and practical way to handle your very normal nervous energy.

Remember that all of what you are thinking and feeling is just energy. Don't fight or flight from your nervous energy, STAY with it! Here are 4 steps that I take at the start of each of my meetings to help me manage my nerves:

- #1. Look**
- #2. Smile**
- #3. Breathe**
- #4. STAY**

#1. Look

Look at the members of the meeting. Eye contact helps to get you more comfortable in your environment. At the start of the meeting, just take a moment to remind yourself that you are there to support the members of this TEAM and have a successful meeting. Quickly scan the room, really look at the people who are attending the meeting.

Chair A Meeting with Confidence

#2. Smile

Smiling helps you & the members of your meeting to relax. Many times, when we get nervous, we can get very serious and our face can tense up. Smiling releases that tension and helps to manage nerves. Remember, you don't have to have a big cheesy grin, just a nice relaxed face with a little smile to let people know that you are glad to be chairing this meeting.

#3. Breathe

Breathing is a great way to manage your nerves. Many times, when we are nervous, the muscles in the body tighten, which can decrease the amount of air we get into the lungs. Being conscious to take a deep breath at the start of the meeting releases that tension, which will support you mentally. Taking a deep breath will help to make you feel more comfortable. (Try it! I promise no one will ever question why you are breathing! They won't even notice, but you will feel the difference!)

#4. STAY

STAY is a mental mantra that I created to help me manage my nerves. **STAY** stands for ***Stop Thinking it's About You!!*** Remember, your nervous energy is a result of you worrying how people might judge you. Whether you are going to do it right, or if you are going to remember what to say. Get out of your own way and make some space mentally by using the **STAY** model. I will literally say to myself, "Susan, Stop Thinking its About You!" The **STAY** model is a great mental mantra that continues to help me manage my own nerves and I hope it does the same for you!

Remember that process management, people management, and nerve management are what a chair has to mentally be keeping in mind in order to keep the meeting flowing and to help the TEAM get work done. If you are not doing these three things, then you are not being an effective chair. So what I am asking you to do is (1) to manage your nerves and get out of your own way, (2) start your meetings mentally focused on the people in the room and (3) the process that you are going to use to get work done.

But, probably the biggest thing to remember about chairing a meeting is that people want you to succeed! When you are effective, it will save them time, energy, and frustration.

QUICK NOTES:

The Mindset of a Confident Chair

- Focus on building TEAM**
 - Create a safe space for people to get involved**
 - Understand your organization's process for running meetings**
 - Think Process Management & People Management**
 - Nerve Management:**
 - #1.Look**
 - #2.Smile**
 - #3.Breathe**
 - #4.STAY**
-

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Chair A Meeting With Confidence

SECTION TWO: KNOW WHAT TO SAY WHEN

Before I share specific scripted examples of what to say when you are in a difficult meeting situation, there is a word that I want you to become very familiar with. That word is: **intervention**. Now I am not talking about the reality TV show. I'm talking about the interventions that a confident chair must make during every meeting to keep that meeting on track and running smoothly. Great chairs are great at making interventions.

What is an intervention?

Intervention – The act of redirecting the focus, the behavior or actions of an individual or group to keep the meeting moving forward productively.

We've all been in those meetings, in which there are side conversations, or a person won't stop talking, or the members keep walking in late. These distractions might seem small, but if the chair lets too many of them slide without making an intervention, then meetings get knocked off course and people will end up getting frustrated. As an effective chair, you have to get great at making interventions during your meetings so that you can get people back on course and keep the meeting moving forward.

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Before I make any intervention I make 2 choices. These are the two things I want you to think about when you see a behavior in a meeting that needs to be redirected. A confident chair has two choices to make.

Choice #1: The timing of the intervention

Choice #2: The type of intervention

CHOICE #1 – THE TIMING OF THE INTERVENTION

When it comes to timing of an intervention you have 3 options. You can make an intervention at:

- 1 - The beginning of the meeting
- 2 - During the meeting
- 3 - The end of the meeting

These really are your only 3 options. So as you think about the timing of your intervention, think about where it best belongs.

Chair A Meeting With Confidence

CHOICE #2 – THE TYPE OF INTERVENTION

Now, once you have thought about the timing of your intervention you need to think about the type of intervention you are going to make. When it comes to how you are going to make an intervention, there are 2 types of interventions.

1 - Direct interventions

2 - Indirect interventions

Direct interventions are interventions that are directed towards a specific person by using their name or making eye contact only with them. Many times, chairs shy away from being direct, but it is a very effective tool to redirect behavior. Being direct is a skill that I encourage you to try to get more comfortable with. It will pay off for you and the TEAM in the long run!

Indirect Interventions are when the chair addresses the entire assembly or group. An example of that could be saying something like, *“I’ve noticed that many members are...”* or *“Let me share with you something that I am seeing.”* When you are being indirect, you are hoping that your intervention will help to correct the individuals in the group while not pointing them out directly. Many times chairs are more comfortable doing this type of intervention. But remember, there are times a confident chair needs to be direct and there are times a confident chair should be indirect. You have to choose which direction to take based on what is going to be best for the group not what is most comfortable for you.

Before we get into examples, I want you to remember something that a very wise friend of mine told me. He said, *“When making an intervention, **correct the behavior, don’t crush, the person.**”* Your interventions must be done in such a way that you don’t crush your participants. If people feel intimidated by you, then they are either going to stop talking or they are going to get really defensive and you’re going to have a different problem on your hands.

If you can get really good at making interventions, you’re going to be able to keep the meeting on track and get work done. So remember all of these examples of “what to say when” have been written in a way to give you an example of an intervention that can be given before, during, or after a meeting in a way that will correct, not crush the individual or group that you are chairing.

The “What to Say When” section was inspired by the countless conversations that I have had with clients when coaching or speaking in their organizations. While I realize that some of the scripts that I am providing might not seem immediately useful you, I want you to look for the bigger meaning. These are samples that will keep you from having to start from a blank slate when you come up with your own interventions. These were created to stimulate your own thought around how to make your own interventions in the meetings that you chair.

While reading the samples ask yourself if this intervention would best be done before, during, or at the end the meeting. Also ask yourself whether the intervention is direct or indirect? Also notice that while each intervention might feel uncomfortable, we as chairs are working extra hard to correct, not crush, our participants. Being great at making interventions will support you in being an effective chair!

As a skilled chair you have to decide the best time to make an intervention and keep in mind that you want to correct, not crush!

ROBERT’S RULES
MADE SIMPLE

WWW.ROBERTSRULESMADESIMPLE.COM

Chair A Meeting With Confidence

WHAT DO I SAY WHEN...

- I start the meeting
- There are side conversations
- People are texting or talking on their cell phones
- The same people keep talking
- People are arriving late or leaving early from the meeting
- People are speaking off topic
- People are not voting, or too many are abstaining
- People make personal attacks
- Someone is crying or having an emotional outburst
- Someone is joking in an inappropriate way
- No one is participating or talking
- People are not volunteering during the meeting
- I get lost or forget where we are on the agenda
- People are interrupting one another
- People are not correctly using parliamentary procedure

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

WHAT DO I SAY WHEN...I START THE MEETING?

When I start a meeting, I start with 3 things in mind. I am thinking about how to best manage the people, the process and my nerves. Basically, I want to get myself into the right mindset so that I can run a productive meeting. When you start your meeting, remember to:

- #1. Look at your audience
- #2. Smile to get comfortable
- #3. Breathe to relieve any tension
4. Recite the STAY model (Stop Thinking its About You)

Going through this ritual will get you more comfortable and will help you to focus your energy in a positive direction. Remember, how you start the meeting sets the tone of the entire meeting. It is a balance of being welcoming but also communicating that you are in charge of this meeting.

Indirect / Start of Meeting:

"I call this meeting to order at (state the time). I would like to start the meeting today by welcoming everyone. Thank you for being prompt and on time. We have a very full agenda so I'm going to ask that everyone stays on task today as we have a lot of important information to get through. First, does everyone have their agenda? (Pause and look around. Assess body language and facial expressions.) Okay, that is great. With that we are going to start with the first item on our agenda which is..."

Having an agenda is an essential tool. Make certain that every meeting you chair, whether it is formal or informal, has some kind of an agenda. If you are chairing a meeting that doesn't have an agenda, do yourself a favor and provide a short agenda verbally at the start of your meeting.

Chair A Meeting With Confidence

WHAT DO I SAY WHEN... THERE ARE SIDE CONVERSATIONS?

Side conversations are very distracting and as a confident chair you need to keep them to a minimum. Remember though, members who are having side conversations might not necessarily be being rude, they might be caught up in the energy of the topic. Remember, correct, don't crush. Here are a few examples you can use to stop side conversations.

Direct / During Meeting

"David & Sam, I would like to invite you back into the meeting. If I could ask that you limit your side conversations so that we can keep the meeting moving forward it would be appreciated. Thank you."

"Before we move any further, James & Melody, I am noticing that you are having a side conversation. I know that there is a lot to say about this topic, but if I can ask you to refocus your attention, it will help us move through this discussion faster. Thank you. Okay, let's move on. Is there any further discussion about..."

Indirect / During Meeting

"I am noticing some side conversations happening. Can I ask everyone for their attention so we can move forward with the meeting? Thanks."

"Before we move any further, I am noticing some side conversations. I know that there is a lot to say about this topic but if I can ask everyone to refocus your attention it will help us move through this discussion faster. Alright, thank you let's move on. Is there any further discussion about..."

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

WHAT DO I SAY WHEN... PEOPLE ARE TEXTING OR TALKING ON CELL PHONES?

This has become a huge issue in the many meetings that I attend. Participants feel like they can text or use their cell phones during meetings. I do not have to tell you how distracting this can be. As a chair, take charge of this issue so it doesn't get out of hand. Establish in your meetings that texting & cell phones are not welcome.

Indirect / Start of Meeting

"I would like to welcome you all to the meeting. Before we begin, I am going to ask that all cell phones are silenced or turned off. Also, please refrain from any texting during the meeting, as it can create unneeded distractions. Thank you ahead of time for helping me with this. Our first item on today's agenda is..."

Indirect / During Meeting

"During the meeting I have noticed several people texting. It is becoming a little distracting. So in order for us to stay focused I am going to ask that we put our cell phones away until the meeting is adjourned. Thank you. (Pause) As a reminder we are talking about..."

Direct / During Meeting

"Before we move any further, James, I have noticed several times during the meeting today that you have been texting and it is becoming a bit distracting. I realize that there are emergencies that need to be taken care of, so if there is an issue please feel free to step outside so that you can give it the attention it needs and then please feel free to come back and join us as your participation is important to today's meeting. Thank you. Moving back to the agenda, we are talking about..."

Chair A Meeting With Confidence

WHAT DO I SAY WHEN... THE SAME PEOPLE KEEP TALKING?

When the same people keep talking, you need to find a way to create the space for other voices. This script is not about shutting anyone up it is about making the TEAM aware that all voices need to be involved in order for the meeting to be successful. Take a look at these scripts to see how they gently call attention to the person that is talking but at the same time inviting others to get involved.

Indirect / Start of Meeting

"Before we start today. I want to remind each of you how important your voice and opinion are to the success of this meeting. There is no such thing as a dumb question and I invite you to share what you are thinking or feeling related to the issues we are going to talk about today."

Indirect / During Meeting

"I am noticing that we keep hearing from the same people. I would like to invite some of the voices that we haven't heard from to share with us what they are thinking or feeling."

Direct / During Meeting

"Joe, we haven't heard from you on this issue. Please share with us what you are thinking or feeling."

"Sara, I want to thank you for your input on this topic but I am going to ask that we take a moment to see if anyone else has anything they would like to add."

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

WHAT DO I SAY WHEN... PEOPLE ARE ARRIVING LATE OR LEAVING EARLY FROM THE MEETING?

People arriving late or leaving early can really create tension between members on a board. As an effective chair, you need to establish that meeting times need to be respected. When we respect meeting times, we are actually respecting each other.

Indirect / End of Meeting

"Before we adjourn, I think it is important for us as a board to recognize that several members have been showing up late to our meetings. This is disruptive and keeps us from being as productive as we need to be. I want to ask the group a question: What do we need to do to make certain that our meetings start on time with everyone here ready to work? Let's make it a goal to get here on time."

WHAT DO I SAY WHEN... PEOPLE ARE SPEAKING OFF-TOPIC?

Sometimes you have to stop people while they are talking. This can be a bit of a challenge. Here are 3 steps that I use to get someone to stop talking so that they can be redirected to help get the meeting back on track.

- #1. Say their NAME
- #2. Thank them
- #3. Redirect the conversation

This example of "What to say when" people are speaking off topic is a perfect time to use these 3 steps.

Chair A Meeting With Confidence

Direct / During Meeting

“Dave. Dave, thank you for your perspective but I want to remind you as well as the rest of the assembly that we are talking about the budget for the event, not the location of the event. For right now can you please keep your discussion focused on the budget? Do you have anything to add about the budget?”

NOTE: Notice how the chair had to say Dave’s name twice. This is very normal when someone is speaking. This is a very important facilitation tip. Do not get offended or think it is rude if you have to say a person’s name a couple of times to get their attention. Their brain is processing and needs a little time to catch up to what they are hearing. Remember, when they are speaking they are listening to themselves first and that isn’t rude. It is normal. You have to say their name. They have to hear their name and then process what they heard before they can respond and you can redirect the discussion to the topic at hand. This might mean you will have to say their name a couple of times.

Direct / During Meeting

“Jim, I appreciate what you are sharing; however, I want to remind you as well as the rest of the assembly that we are currently talking about the main motion, which is Jim, do you have anything additional to add with regards to the main motion?”

**ROBERT’S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Indirect / During Meeting

“Before we continue, I want to thank you for your participation, but I want to remind each of you that we are currently talking about the main motion. Please keep your discussion focused on the main motion, which is.... Is there any further discussion?”

WHAT DO I SAY WHEN... PEOPLE ARE NOT VOTING, OR TOO MANY ARE ABSTAINING?

When people are not voting this is a great indicator that people may be lost or they are uncomfortable with the decision making process. If people are consistently not voting in your meetings then this might be an indicator that additional training and support is needed. If the process that you use is Robert’s Rules of Order then providing your members with resources like my [Robert’s Rules Made Simple Solution](#) or setting up a time for your members to attend one of my [live interactive webinars](#) can help get your members more comfortable with the voting process. These training resources can be found at [RobertsRulesMadeSimple.com](#).

While providing additional training is a long term solution, here is a script you can use to move through this difficult meeting behaviors. As a chair, you have to step in and make certain that everyone has the information they need in order to vote. After all, voting is a board member’s ultimate responsibility.

Indirect/ During Meeting

“I am noticing that many of you did not vote. It is important to remember that your primary job as board members is to vote on these various issues. Before we take any other votes I will pause quickly to describe to you what we are voting on...”

Chair A Meeting With Confidence

Indirect / During Meeting

"Before we take a final vote, I want to remind each of you that you can choose to abstain only when you have a direct conflict of interest related to the motion on the floor. If you are not voting because you do not have enough information, then it is important that you ask any questions that you might have before we vote. Does any one have any further discussion or questions about the motion?"

WHAT DO I SAY WHEN... PEOPLE MAKE PERSONAL ATTACKS?

Personal attacks are destructive. As a chair you must step in when any attacks are being made. Remember, it is not your job to take sides, rather you should be helping to redirect a person's actions so that the meeting can keep moving forward. It is always a great idea to remind the group to attack the problem, not the person!

Indirect / Start of Meeting

"I want to welcome you all to the meeting. Before we start I want to say that there are some potentially hot or controversial items on the agenda today. I would remind you that it is okay to disagree but any kinds of personal attacks or emotional outbursts will not be tolerated. I look forward to a productive meeting. The first item on the agenda is..."

Direct / During Meeting

"Jon, I'm going to ask you to keep all comments directed to the chair. We will not allow any personal attacks during our meetings. If you have any additional information to share regarding the topic on the table, please feel free to share it at this time."

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

WHAT DO I SAY WHEN... SOMEONE CRIES OR HAS AN EMOTIONAL OUTBURST?

Some people get very uncomfortable when people start to get emotional. In an of itself, crying is not a bad thing. It is just how some people process when they feel emotionally connected to what is going on. Remember, you do not have to fix the person. You just want to acknowledge them and then keep the meeting moving forward.

Direct & Indirect / During Meeting

"Jane I see that you are upset. I assume that if you are feeling this way right now there are probably others in our meeting who are feeling the same way . I am going to ask everyone to take a deep breath and remember that emotions are not a bad thing. Let's use what we are feeling to help us create a better outcome. Jane is there anything you would like to add to the topic that we are discussing?"

WHAT DO I SAY WHEN... SOMEONE IS JOKING IN AN INAPPROPRIATE WAY?

Many times, people use humor as a defense mechanism. Humor is sometimes hard to handle in a meeting because you need to make the intervention without turning the mood in the complete opposite direction. Humor is not bad, but it could be masking the real issue. One tip that I give to all my chairs is to listen for what is underneath the laughter. Many times people will laugh when they are actually angry, hurt, or frustrated.

Direct / During Meeting

"Dan, while I appreciate your humor, I want to make sure we stay on track with what we need to cover in today's meeting. I appreciate your desire to lighten the mood but I do not want to make light of this situation. Let's refrain from any additional jokes until we finish with the topic at hand. Thank you..."

Chair A Meeting With Confidence

Indirect / End of Meeting

“Before we end the meeting today, I want to share an observation with the group. During today’s meeting I noticed several people laughing after people spoke. While I am not in any way telling you not to laugh or have fun, I am asking you to think about how your laughter might be impacting the members of our meeting. A certain amount of joking is fun and can lighten the mood, but too much can take away from our overall productivity. I am going to ask that in our next meeting we all pay attention to the laughter and the joking as I think it might be becoming a distraction.”

WHAT DO I SAY WHEN... NO ONE IS PARTICIPATING OR TALKING?

When people aren’t participating, they might actually be lost or not feeling safe. Again this is another indicator that your board might need training. As a great chair don’t get mad or frustrated with your group when people are not talking. Make an intervention that will support them so they start feeling comfortable & safe enough to get involved.

Indirect / Beginning of Meeting

“Welcome to today’s meeting. Before we start, I want to ask for everyone’s participation. During the last meeting, I noticed that when I asked for discussion, very few of you participated. Your questions, thoughts, and opinions are what will make this meeting more productive. I am going to ask everyone to work hard to participate today. Thank you.”

Direct / During Meeting

“I am noticing the none of our new members are talking. Remember, your thoughts and participation are important. Does anyone have anything to add regarding the motion on the floor?”

WHAT DO I SAY WHEN... PEOPLE ARE NOT VOLUNTEERING DURING THE MEETING?

Sometimes people have to be threatened or bribed into participating. This never feels good. As a great chair, the best thing you can do to inspire participation is to be willing to make good interventions. Call attention to the fact that no one is volunteering and be willing to state the impact that this lack of participation will have if people do not step up and get involved.

Indirect / During Meeting

“So, this is the second time this meeting when I have asked for volunteers and only see the same 3 hands being raised. I want to remind the group that getting involved is an important part of all our jobs. I want to pause for 1 moment to encourage a few more volunteers.”

Chair A Meeting With Confidence

WHAT DO I SAY WHEN... I GET LOST OR FORGET WHERE WE ARE ON THE AGENDA?

Remember that occasionally getting lost in meetings is normal. It happens to everyone. If you get lost or the participants get lost, remember to slow down, take a deep breath, and take a moment to collect your thoughts so you can get back on track. Getting lost isn't bad, staying lost is.

During the Meeting (When the Chair is Lost)

"I am going to pause for a moment as I need to connect with our parliamentarian about the exact wording of the motion that we are discussing."

"Give me a moment to collect my thoughts so that I can get us back on track."

Indirect / During Meeting

"From the facial expressions and body language that I am sensing that many of you are lost. Let's take a moment to recap where we are so that we can move forward. Currently we are talking about..."

BIG TIP: If you are using Robert's Rules of Order as your meeting process, then designate one person who will be your Parliamentarian. This person doesn't have to be an expert but this will be the person you turn to to organize your thoughts during a meeting on the off chance you get lost. There is nothing worse than getting lost as the chair and then having your entire board try to help you out. In cases like this, everyone usually ends up getting lost and the meeting suffers. So designate a Parliamentarian who will help you stay on track during the meeting!

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

WHAT DO I SAY WHEN... PEOPLE ARE INTERRUPTING ONE ANOTHER?

When people feel passionate about a topic, rules can sometimes fly out the window. That is why it is your job as the chair to only allow one person to talk at a time. Nothing gets done when people talk over each other.

Direct / During the Meeting

"Frank, I am going to ask that you let Sarah finish. In order to keep our meetings running smoothly, it is essential that we not interrupt one another. Sarah, please continue."

Indirect / Before the Meeting

"Welcome to the meeting. Before we start I wanted to make sure that everyone remembers to first be recognized by the chair prior to speaking. We have a very full agenda with lots to cover and we need to keep interruptions to a minimum."

WHAT DO I SAY WHEN... PEOPLE ARE NOT CORRECTLY USING ROBERT'S RULES OF ORDER?

As a chair, you have to work very hard to make certain that everyone is using the same process. And that means people have to practice the process and use it during the meetings. If people are having a hard time, slow down and give them a chance to use the process properly. When I am the chair, I look at my role as that of a translator. I encourage you to take the necessary time to translate the process for all of your members and encourage them to practice using Robert's Rules of Order properly during your meetings!

Chair A Meeting With Confidence

Indirect / During Meeting

"I want to take a moment to remind everyone of the importance of using Parliamentary Procedure properly during our meetings. It will help us to keep order so that we can be efficient and use our time wisely. If you are lost or do not know exactly what to say, please let me know and I will help you out. Thank you."

Direct / During Meeting

"Sean, it sounds like you are trying to make a formal motion. Let me stop you for a moment and help you state the motion properly so that we can have it reflected in the minutes. The correct way to state that motion is..."

Indirect / Before the Meeting

"Before I formally call the meeting to order, I want to remind each of you the importance of using Parliamentary Procedure properly during the meetings. Having a common structure to conduct business will help us to be more efficient. I realize that many of you are still learning, so if at anytime during the meeting you get lost or are confused about something related to the use of Parliamentary Procedure, please raise your hand and say, "Point of Parliamentary Inquiry." When you say this, I will stop and answer whatever question you have related to the proper use of Parliamentary Procedure."

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Note: At www.RobertsRulesMadeSimple.com we now offer the **Robert's Rules Made Simple Instructor Certification Program**. This certification will give you a complete 90 min Robert's Rules Training that you can teach to your boards!

THIS CERTIFICATION INCLUDES:

1. A complete Leader's Guide with scripted examples of what to say when leading the training
2. Copyable Participant's Guides to support learning and retention
3. An editable PowerPoint deck that will keep participants engaged while you train
4. One copy of the Robert's Rules Made Simple DVD that is to be played during the training to show this material in action
5. The "Confident Public Speaking" audio course to help build your personal confidence as a presenter and trainer
6. A full series of training videos that will walk you step by step through how to train this class
7. Live phone coaching with Susan Leahy that will answer any questions that you have prior to training this class
8. Discounted pricing on additional DVDs for your clients
9. A full License to use the Robert's Rules Made Simple DVD and material in any commercial training



Chair A Meeting With Confidence

WHAT DO I SAY WHEN... THE DEBATE IS DRAGGING ON AND ON?

As the chair, you have to keep the meeting moving forward so if the debate is dragging on and on you might need to make an intervention. Remember, you can't stop the debate, but you can call attention to the fact that time is running out and that it would be productive to move forward.

Indirect / During Meeting

"I am noticing that we keep hearing similar points, does any body have anything else different to offer?"

Indirect / Start of Meeting

"Before we start today I want to call everyone's attention to the agenda. We have a lot of items to work through today so I am going to ask that you keep comments brief and be specific so that we can get through all that we have on our plate today."

WHAT DO I SAY WHEN... I END THE MEETING?

Many times meetings end in a rush because time has run out. I really encourage you as the chair to try and budget your time. Leave a little time at the end of your meeting to do a recap and adjourn. The end of the meeting is a great time for you to give your perspective and share what went well during the meeting as well as what needs to be improved.

It is also a time to thank the members for the work that they have accomplished. If at all possible, try to end your meetings with at least a 2-5 minute cushion so you can do any final interventions or make any last-minute comments.

Indirect / End of Meeting

"Before we adjourn the meeting today, I would like to thank you all for your hard work. I felt like the meeting went well today. We had only a couple of small interruptions with cell phones ringing. So for next time I will remind us to turn off those phones. Again be proud of the work that we are doing. Your energy and input is valued. Thanks much and with that said, do I have a motion to adjourn?"

Being an effective chair is not easy. Making effective interventions is a crucial part of your job. Something to also consider is that when you use these scripts, think not only about **what** you are going to say but also **how** you are going to say it. A large part of your success with making interventions is connected to the tone of voice you use and the body language that you display. Be firm, speak clearly and know that the interventions that you are making are helping the TEAM to run better meetings!

It is my sincere hope that you find these scripts helpful. They are not meant to be read verbatim during a meeting, but used as a guide so that you can think of your own way of making interventions. Interventions are an essential part of any well run meeting, and great chairs are great at making interventions.

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Chair A Meeting With Confidence

SECTION THREE: MEETING EVALUATION

If you are going to run great meetings, you need to create the space to evaluate those meetings. Many times organizations get stuck doing things a certain way because *“that’s how it’s always been done”*.

While, I am okay with the *“if it ain’t broke, don’t fix it”* approach, most meetings I watch are at least somewhat broken and could use some fixing.

Have you ever heard the definition of insanity? Doing the same thing over and over and expecting a different result. Well, that’s exactly why meetings might be driving you crazy. People keep making the same mistakes over and over.

In order to be an effective chair, you have to be willing to evaluate yourself and the meetings that you are running. Effective chairs are willing to change things up and try new things to see if they will support a better meeting outcome. The evaluations below give you some examples of how to evaluate your meetings.

I have provided one short evaluation that can be done quickly after a meeting, as well as a longer evaluation that can be done with the input of the members of the meeting. Remember, do not do all the work yourself. Ask your members what is working and what is not working and then take their feedback and try something different next time. After all, your job as a confident chair is to run effective meetings!

**ROBERT’S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

SAMPLE SHORT EVALUATION

What worked well?

What needs improvement?

How did I manage the process?

How did I manage the people?

How did I manage my nerves?

SAMPLE LONG EVALUATION

Meeting Evaluation Checklist

It is important to periodically evaluate how meetings are progressing. A well-planned meeting will encourage members to participate in the process and will assist the board in achieving its goals. The following checklist should be completed by the chair as well as one other member of the meeting to get a balanced perspective.

Chair A Meeting With Confidence

PRE-PLANNING FOR YOUR MEETING

- _____ Our agenda is complete and easy to follow.
- _____ The date of the meeting was set in a timely manner.
- _____ The meeting room was reserved prior to sending out the agenda.
- _____ The members of the board were properly notified about the date and location of the meeting.
- _____ The members were sent an agenda and resource materials for action items at least one week prior to the meeting.
- _____ Board members were informed of the agenda topics prior to the meeting.

Successes:

Areas for Improvement / Comments:

DURING THE MEETING

- _____ Board members arrived for the meeting on time.
- _____ The meeting started on time.
- _____ Guests and newcomers were welcomed into the meeting.
- _____ The board had all the resources it needed to make informed decisions.
- _____ The physical layout of the room allowed for member participation.
- _____ The chair followed the agenda and allowed new business to be added as necessary and appropriate.
- _____ The meeting did not have any outside interruptions. (phones etc.)
- _____ The chair effectively used Robert's Rules of Order (or insert your process) to run the meeting.
- _____ The chair allowed members adequate time to discuss each agenda item before moving to a vote.
- _____ The chair summarized the main points of the discussion before moving to a vote.
- _____ Presenters were prepared and provided resources to assist the board in making informed decisions.
- _____ Members were able to keep up with the pace of the meeting.
- _____ Progress was made on agenda items.
- _____ As needed, tasks were delegated to board members.
- _____ Action items (who, what, where, when) were clearly defined in the meeting.
- _____ Members participated in the planning of the agenda for the next meeting.

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

Chair A Meeting With Confidence

_____ Members were thanked for participating in the meeting.

_____ The meeting ended on time.

_____ Members felt that their time was well spent and they are making a difference.

Successes:

Areas for improvement / Comments:

GROUP OBSERVATIONS

- Who did not attend the meeting? Did they call in advance?
- Who participated and who did not participate in the discussion?
- Did members understand the purpose of the meeting and items on the agenda?
- What board members have improved since the last meeting?
- Were the pros and cons of each issue discussed and considered?
- Did members provide feedback and offer ideas to the board?

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

- Did members feel free to express their thoughts and concerns in the meeting?
- Were members able to speak without being interrupted?
- Was one topic discussed at a time? Was the discussion relevant to the topic?
- Were all questions answered before moving to a vote?
- How did the board as a whole handle differences in opinion and conflict?

Successes:

Areas for improvement / Comments:

FOLLOW-UP AFTER MEETING

- _____ The chair reviewed the successes and areas of improvement of the meeting.
- _____ The chair surveyed the board members to get their perspective on how the board is progressing.
- _____ Minutes are compiled and reviewed.
- _____ The chair follows-up on delegated tasks with members prior to the next meeting. (Progress reports, agenda items etc.)

Chair A Meeting With Confidence

CONCLUSION

Being an effective chair is a learned skill. If we are going to run great meetings, we need a great chair. Think about your mindset. Keep focused on building the TEAM, and remember that you have to create a safe space for the voices of the majority and minority. Take time to manage both the process and the people during a meeting. Remember that you have to become great at making interventions. Use the scripts provided here as a starting point to figure out how to redirect behavior that is disruptive to your meeting. Finally, evaluate how well you are doing and think about what you can do to make your meetings more effective.

Being a great chair is a learned skill that you will continue to hone for as long as you are running meetings. Know that this is a skill you will be respected for possessing. I want to wish you luck and hope that all your meetings are happy!

Susan Leahy MA

**ROBERT'S RULES
MADE SIMPLE**

WWW.ROBERTSRULESMADESIMPLE.COM

SUSAN LEAHY PERSONAL COACHING FOR CHAIRS

As a facilitation expert and communication coach, I work with many chairs to help them feel more confident when running meetings.

If you feel like you need additional support, I am here as a resource. My coaching is done in person when possible, but also over the phone and via video-conference.

Contact me for more information: Susan@RobertsRulesMadeSimple.com

The logo for Susan Leahy features the name "susan" in a lowercase, sans-serif font, followed by a decorative graphic of a starburst or cluster of dots, and then the name "leahy" in a lowercase, sans-serif font.

SUSAN'S SPEAKING AND WORKSHOP TOPICS

- From Group to Team
- Leadership Bootcamp
- Confident Public Speaking
- Robert's Rules Made Simple
- Personal Coaching For Chairs
- Relationship / Team Building

For more information visit: SusanLeahy.com