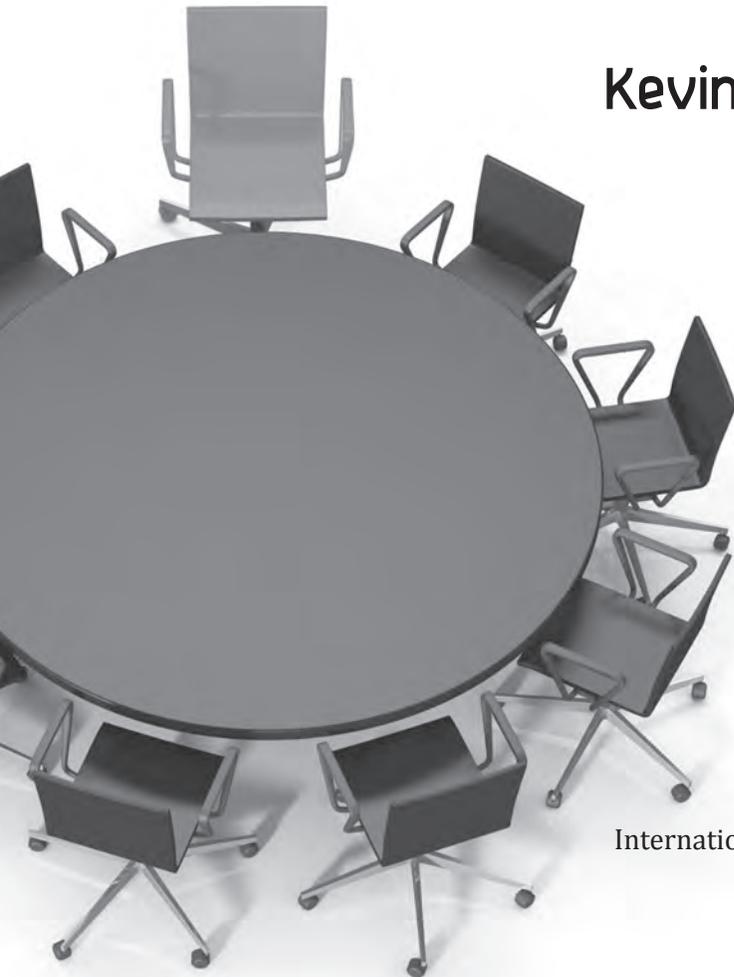


CHAIRING A MEETING

The Quick & Essential
Guide to Rules of Order

Kevin Paul MA, MPA



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Notice to Readers

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Who Should Use This Book, and Why?

1. Who Should Use This Book?

This book is intended primarily for those people who find themselves in a situation where they have to chair a formal meeting but have little or no experience in the matter.

However, the basic concepts, skills, and information discussed throughout the book are applicable to almost any type of experience and any type of meeting — from large business meetings conducted at national conventions, to smaller and less formal gatherings of community groups, strata councils, and so on.

How much experience do you have chairing meetings? You likely fit into one of the following categories.

1.1 The novice

You find yourself in the position of chairing a meeting but have little or no experience thus far.

1.2 The rookie

This is not the first meeting you have chaired, but you're still somewhat inexperienced. You want your next meeting to be better than your last one.

1.3 The veteran

You've run many meetings, but it has been a while since the last time you were in the chair. You want an efficient way to brush up and a concise reference you can quickly check during the meeting.

1.4 The advisor

You are the person tapped to advise the Chair on matters of procedure. This situation usually comes about because someone was elected President or Chair because they have many excellent qualities that make them a great leader for your organization. The only problem is that they have no clue how to run a meeting.

1.5 The well-informed member

This book can also be useful to the participants in meetings, even if they are not going to preside. It is always easier and more enjoyable to take part in discussions if you know the rules that will govern them. Many good ideas and suggestions are lost to organizations because members do not know the accepted manner in which to bring their thoughts before the group.

2. How to Use This Book

Use this book as a quick introduction to the basics of how to conduct a meeting. In the next three easy-to-read chapters, you will be introduced to the essentials of running a meeting. They are all you need to become an excellent chair.

A couple of hours of study and practice on your own, using this book as a guide, will prepare you for presiding over, or participating in, just about any type of meeting.

Do not use this as a definitive rule book. There are many of those kinds of books (see Appendix) and they are not really helpful if you want to avoid a mass of confusing rules, regulations, procedures, and archaic practices.

The later chapters are meant as supplements to the main lesson taught in chapters two through four and should be read only if you wish more detailed preparation or if you are simply interested enough to learn more.

3. What Are Rules of Order and Why Are They Important?

“Rules of order” and “parliamentary procedure” are general names given to the set of rules, forms, and traditions that have been developed to govern meetings.

Taken in their totality, these rules are very confusing and intimidating, and few people can be considered genuine experts in all their intricacies. So why, then, is it necessary to have meetings conducted according to their procedures? If the whole process is so complicated, why bother?

The short answer is: BECAUSE THEY WORK. In fact, they work so well that the essence of parliamentary procedure has remained unchanged since its origins in medieval Britain.

The next question that immediately comes to mind is: What makes these rules work so well? To answer that question properly, let’s start at the beginning of why you are reading this book. For better or worse, you have the honor of chairing a meeting. The basic purpose of a meeting is to conduct the business of your group in a fair, orderly, and expeditious manner. During the meeting, everyone must feel that —

- they understand what is going on,
- they have the chance to voice opinions on the topics discussed, and
- the decisions truly reflect the will of the majority of the group.

After the meeting, the group must be confident that the business was conducted in a proper manner and that the process used will stand up to any later challenge. The rules of order that have evolved in the western world (particularly in Britain, the Commonwealth, and North America) have proven to be the best way to ensure the satisfactory running of a meeting.

If you belong to an organization that must have formal meetings to make routine as well as important decisions, you know how crucial it is to make those decisions in an organized and coherent manner. Most of us have sat through a really badly run meeting: It is a painful experience and very unsatisfying.

The bad news is that the fault of most poorly run meetings lies with the person in the chair. The good news is that kind of fault is easy to fix.

Chairing a meeting is not difficult. It only takes a little preparation, a little confidence, and a lot of common sense. Add these three factors to the qualities that caused your organization to place you in the chair in the first place, and you have the makings of a good presiding officer.

Unfortunately, part of the preparation has often meant plowing through a dense handbook on rules of order. Without much guidance, practice, or, often, much interest, studying such a book becomes a chore that the newly selected president tries to avoid — and usually does. The result is often loosely run meetings that are an embarrassment to the chair and the group.

What this book will do is prepare you to conduct a meeting of which you and your organization can be proud. If you study the next three short chapters, practice some of the basic forms, and think about your meeting in advance, you will be able to confidently take the chair of your first meeting after only an hour or two of work. You will NOT have to become an expert in *Robert's Rules of Order*, or *Bourinot's Rules of Order*, or any other rule book.

The complete list of rules has become long and complicated because it tries, quite rightly, to cover all the situations that can come up in a meeting. Where people go wrong in their first experiences with parliamentary procedure is in the assuming they have to know it all before they can preside over a meeting. We've all run across the obnoxious person at a meeting who insists on strict observance of the letter of the rules, and the chair is neither confident nor knowledgeable enough to stop it. There is also the meeting where no one, including the chair, knows the "official" way to proceed. Both situations are uncomfortable — and unnecessary.

If you know the basics, then, in the vast majority of cases, you know enough to cope with everything likely to arise at your meeting.

The rules are more flexible than you may expect. They are devised to serve you and your organization. They are not supposed to get in your way; they are supposed to free you from worry and let you get on with running an efficient meeting.

4. What Are the Official Rules of Order?

You should not feel bullied into using any so-called “official” book on rules of order. There is no legal requirement that you abide by a particular set of rules. *Robert’s Rules of Order* is the most frequently cited authority on parliamentary procedure, and it has become a common misconception that this is the only pattern to follow. It isn’t. You and your organization can use any procedure you wish; in fact, you can even create your own. *Robert’s* is just one of many books on the subject, and all of them are based on the same essential concepts of how to conduct a meeting. As long as you proceed according to the simple, accepted principles of procedure, you will be on firm ground.

There are many reasons for *Robert’s* popularity. It is comprehensive and its format has proven to be very durable. It is, however, more complex than is necessary for most groups. The book you are reading now is all you need to run most meetings. A copy of *Robert’s Rules of Order*, or one of its competitors, would not be out of place at your side as something to refer to in extraordinary circumstances, but you should hardly ever need it.