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Robert's Rules 'Lite' And Consent Agendas: 6 Tips For Running Efficient And Effective Meetings

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Whether you are running your organization's board, committee or membership meeting, being both efficient (from a time standpoint) and effective (from a goals/follow-up standpoint) are critical. Yet in our busy daily lives, organizing and running meetings often is a rushed task – meetings tend to run long and follow-up is often lacking. Here are six tips for running efficient and effective meetings:

1. Consider Use of a Consent Agenda

Agenda items that are non-controversial nature could be included on a consent agenda. This would include reports such as those relating to membership or communications. If the reports are typically read or given at a meeting with little to no discussion, consider including those items in a consent agenda. The consent agenda is distributed at the same time the meeting agenda is sent and contains all of the various reports.

The consent agenda is listed on the meeting agenda – typically as the second item of business after approving the minutes of the previous meeting. The motion is made to accept the consent agenda, the motion is seconded and then any discussion is made regarding the items in the consent agenda. After any discussion is concluded, the group votes to approve the consent agenda which means that if approved, all items in the consent agenda are approved as well.

Note that the consent agenda is not a good vehicle for items that are typically discussed and debated at board meetings, including changes to board policies and discussion of fiscal items and expenditures.

2. Distribute Meeting Notice and Agenda

Unless otherwise specified in the organization's bylaws, the notice of the meeting can be distributed electronically and should be sent within the timeline required by the organization's bylaws. The agenda, along with any consent agenda, should be included with the meeting notice whenever possible. Any confidential documents should be presented in person at a live meeting or sent via email in a password-protected document for a meeting conducted by telephone or other electronic means. The notice should also remind recipients that the materials are confidential and that they should not forward or otherwise distribute the materials.

3. Gain a Consensus on Running the Meeting – Robert's Rules or Robert's Rules "Lite"?

When a new chair takes over the organization, have a conversation with the group and do a "pulse check" as to how the group would like to run the meetings. Some groups like to use formal parliamentary procedure, such as that found in Robert's Rules of Order, but others find such a format too formal. As such Robert's Rules 'Lite' – the basics of Robert's Rules – could be in order. That means the rules regarding motions made, seconded, discussion, voting, etc. are followed, but the various other parliamentary motions and procedures are not followed. In the end, the group should decide the rules as to how it wants the meetings to be run, so that they feel comfortable coming to the meetings and in participating in the process.

4. Prepare Proper Minutes

One common mistake groups often make is that they prepare minutes of the meeting as if they were a "transcript" of the meeting, rather than a summary of the action items from the meeting. Minutes should show the topics that were addressed at the meeting and the action/motion that was taken as a result of discussion on the topic. One strategy in preparing minutes is to use the agenda and then list the action items, motions and next steps that arise out of the discussion under the corresponding topic in the agenda. That way, the agenda can be used both as an agenda and as a format for the meeting minutes.

Many also ask whether the minutes should list the name of the motion maker and the person who seconds the motion. Unless the group has a long history of doing so or has been advised otherwise by its legal counsel, listing of the names is not required. So the minutes would be phrased as "Motion made, seconded, all approved," as opposed to "Motion made (Smith), seconded (Jones), all approved."

5. Develop a Policy for Meeting by Telephone or Electronic Means

For organizations that frequently meet via phone or electronic means, it is a good idea to develop a policy as to how such meetings should be conducted. For example, one good practice is to ensure that before each person speaks they say, "This is [NAME]…." Also, if a person needs to exit the meeting before it adjourns or needs to enter the meeting after it has started, the minutes should reflect the times the person arrived or departed. Also, when voting, a typical voice vote is sufficient, but if the results of such voice vote are not conclusive, a roll call vote should be taken.

6. Prepare a List of Follow up Items/Dashboard

Meeting participants are often frustrated by the fact that they discuss

many items and make decisions during the meeting, but that by the next meeting, there is no follow-up on the status of the tasks. As such, one best practice is to add a "dashboard" or "to-do" list at the end of the minutes to keep everyone on track as to what tasks are outstanding, who is responsible for the tasks and when the tasks are to be completed. This is a good way to keep everyone on track and to advance the decisions made during the meeting.

So the next time you are called upon to run a meeting, remember these tips and do your best to make the most and best use of everyone's time in order to advance the mission of the organization.