

**A COMPLETE SET
OF SCRIPTS FOR
MEETING CHAIRS
THAT USE
ROBERT'S RULES
OF ORDER**

**ROBERT'S RULES
MADE SIMPLE**
THE EASY WAY TO LEARN
ROBERT'S RULES OF ORDER

WHAT TO SAY WHEN

FOR CHAIRS

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www.RobertsRulesMadeSimple.com

W E L C O M E & O V E R V I E W

Welcome!

My name is Susan Leahy MA. CSP and I am the creator of Robert's Rules Made Simple, North America's leading resource for Robert's Rules education and board development.

I am a consultant, speaker and coach who specializes in working with boards to help them run more effective and productive meetings. Over the past 20+ years I have worked with close to 10,000 boards of all types across the United States and Canada helping them to use Robert's Rules of Order to get more work done.

Chairing is a learned skill, but unfortunately, very few chairs receive any formal training on how to run meetings. And, because it is my goal to help you run great meetings, I have created this set of scripts to help you know "what to say when" at the key moments of your meetings.

This "What to Say When..." set of meeting scripts has been adapted from my CHAIR WITH CONFIDENCE PROGRAM, an all-in-one online course that teaches anyone how to be a confident and skilled meeting chair.

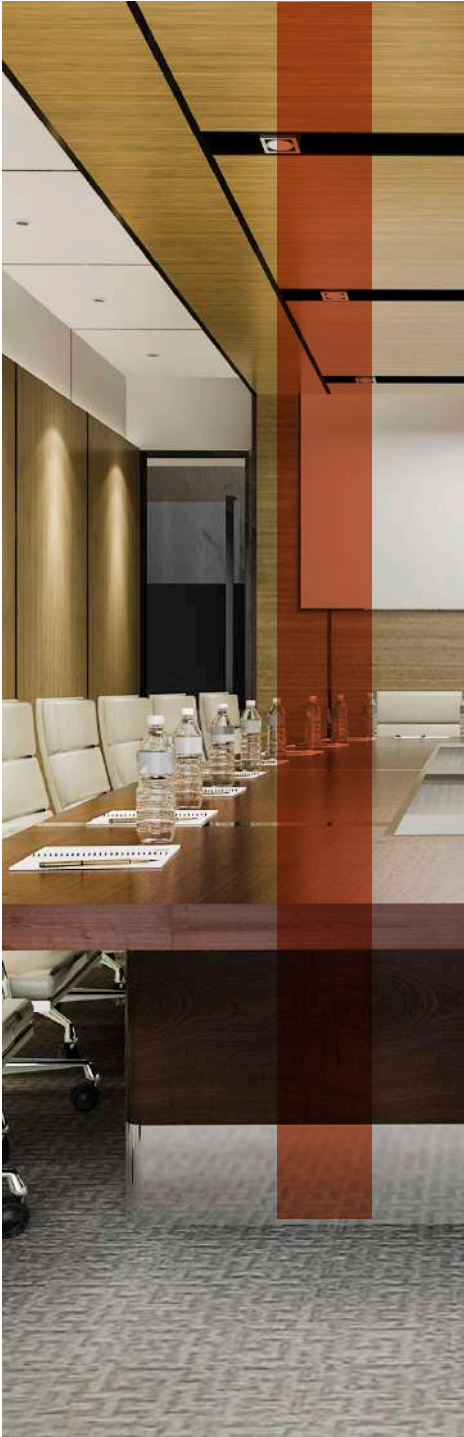
For more information about or to purchase the CHAIR WITH CONFIDENCE PROGRAM visit: www.RobertsRulesMadeSimple.com/chairing

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WHAT TO SAY WHEN FOR CHAIRS

Contents



1	How to Use These Scripts	4
2	Opening the Meeting.....	5
3	Business Items & Information Items	7
4	Making Motions	10
5	Managing Debate	13
6	Voting	15
7	Closing the Meeting.....	17
8	Bonus Section	18
9	How to Work With Susan.....	20



In working with my coaching clients I have seen how much having a script to follow bolsters their confidence when chairing meetings. And that is why I am sharing this set of scripts with you - to help bolster your confidence - and it is my hope that the next time you are leading a meeting you will “Know What to Say When...”!

I suggest that you begin by reading the entire set of scripts from beginning to end. Take your time and move through each section absorbing the feel of the language of meetings.

Once you have read all the scripts, I encourage you to go back and read each script out loud to help you get more comfortable with the rhythm of the language of meetings.

Do not try to memorize these scripts, rather use them as a springboard to get you started. Feel free to change, add or subtract words or phrases to suit your own specific needs, and always try to bring some of your own personality and energy into the boardroom!

Happy Meetings!

Susan Leahy MA. CSP



Setting the Context

As you begin your meeting you have a powerful opportunity to set the context (energy) of your meeting. Don't underestimate the importance of this! Your board members are there because they want to be part of making a difference, and if you can effectively set the meeting context right off the bat, then your meeting will feel better and run smoother for ALL participants.

I always encourage the chairs that I coach to start by answering the following question:

Q- "What do you want people to think or feel while participating in your meeting?"

A- "I want people to think or feel _____, _____, _____, and _____."

Choose 4 words that express what you want your board members to think or feel during the meeting. Here's some possible words to get you started...

- ➔ *Seen*
- ➔ *Heard*
- ➔ *Respected*
- ➔ *Valued*
- ➔ *Safe*
- ➔ *Fun*
- ➔ *Productive*
- ➔ *Meaningful*
- ➔ *Open*
- ➔ *Generous*
- ➔ *Empowered*
- ➔ *Connected*
- ➔ *Engaged*

Clearly defining this context will help you as the chair to set the overall tone of the meeting that you hope to have.

Bookending

I encourage the chairs I work with to “BOOKEND” their meetings. Bookending is a powerful tool whereby you open and close your meetings with context (energy) that you want everyone to experience.

Here’s an example of a meeting opening that could be used as the first half of a “bookend”:

CHAIR:

“Before we officially start today’s meeting, I would like to welcome everyone and let you each know that it is my intention as your chair that we create a space where every member of the board feels seen, heard, respected and valued.

So, with that said I call this meeting to order at 8:35am on May XX, 20XX.”

“Moving on to the first item on the agenda which is.....”

The second half of the bookend can be found in Section 7: CLOSING THE MEETING



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What to Say When - For Chairs



One of the crucial lessons that every board chair must learn is how to handle business items as opposed to information items.

So what is the difference between “business” and “information” items anyhow?

A simple way to think about the difference is that business items require action while information items do not.

Business items include things like approval of minutes and new business. While information items are things like officer reports and announcements.

So, step 1 is to ask yourself:

“Is this a business item or an information item?”

Business Items

Boards that use Robert’s Rules of Order will obviously require the use of Robert’s in order to deal with business items.

Let’s start with something that most every chair will have to handle - approving the minutes from the last meeting.

CHAIR:

“The first item of business on the agenda is the approval of the minutes. Is there a motion to approve the minutes from our last meeting?”

A board member raises their hand.

CHAIR: "The chair recognizes Member A."

BOARD MEMBER A: "I move to approve the minutes as presented."

CHAIR: "Is there a second?"

A second board member raises their hand.

CHAIR: "The chair recognizes Member B."

BOARD MEMBER B: "I second."

CHAIR: "It has been properly moved and seconded to approve the minutes from our last meeting as presented. Are there any corrections or changes?"

No comment from the board members.

CHAIR: "Seeing none, all those in favor of approving the minutes from our last meeting as presented please say aye. All opposed say no."

The board members vote aloud and the chair tallies the votes.

CHAIR: "The minutes are approved by voice vote."

CHAIR: "Moving on to the next item on the agenda which is regarding the business item to approve the annual budget, is there a motion?"

Another board member raises their hand.

CHAIR: "The chair recognizes Member C."

And Board Member C makes their motion...

Information Items

Now back to your Step 1 question:

"Is this a business item or an information item?"

When you have an information item to deal with you DO NOT use Robert's Rules of Order. The thing to remember as the chair is that your job is to move through each information item as quickly and efficiently as possible and it is important to establish just HOW you will get through each information item.

What to Say When - For Chairs

Here is an example of how to facilitate your way through an information item:

CHAIR:

The next item on the agenda is an update on the expenditures to date for the Independence Day celebration. This is an information item. We will first hear a short presentation from Member B and then I will entertain any clarifying questions. This information item should take no more than 10 minutes.

The two key things to remember when dealing with an information items are:

- 1. Establish a timeframe.**
- 2. Only ask for clarifying questions.**

The two things to avoid when dealing with information items:

- 1. Allowing debate or trying to make decisions.**
- 2. Spending too much time on information items and leaving too little time for business items.**



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Dealing with motions is the meat and potatoes of most meetings and this is where most of the chairs that I work with find they need help.

It is important to remember that Robert's Rules of Order has a simple rhythm when it comes to handling most motions.

Here is what that rhythm usually looks like:

THE RHYTHM OF ROBERT'S

Chair: Asks for a motion & recognizes a board member.

Board Member: Makes a motion.

Chair: Asks for a second & recognizes a board member.

Board Member: Makes a second.

Chair: Repeats the motion and recognizes a board member for discussion.

Board Member: Either debates for or against the motion or makes another motion.

Chair: If no more discussion chair will entertain a vote.

As the chair, once you understand the rhythm of Robert's Rules of Order your meetings will start to have a more natural flow.

Use this script to get more comfortable with the "rhythm of Robert's":

What to Say When - For Chairs

The Rhythm of Robert's

CHAIR: "Is there a motion regarding the next item of business on the agenda, which is to approve the allocation of funds from the 35th Annual Community Fun Run.

Board Member A raises their hand.

CHAIR: "The chair recognizes Member A."

BOARD MEMBER A: "I MOVE to approve the request by the XYZ Club for \$1,500 of the funds raised during the Fun Run."

CHAIR: "Is there a second to the main motion?"

Board Member B raises their hand.

CHAIR: "The chair recognizes Member B."

BOARD MEMBER B: "I second the main motion."

CHAIR: "It has been properly moved and seconded to approve the request for \$1,500 by the XYZ Club from the funds raised during the Annual Community Fun Run." Is there any discussion regarding the main motion?"

Board Member B raises their hand.

CHAIR: "The chair recognizes Member B."

NOTE: At this time Member B can do 1 of 2 things:

- 1. Debate for or against the motion.**
- 2. Make another motion.**

Board Member B decides to make another motion.

BOARD MEMBER: "I move to amend the main motion by striking out \$1,500 and inserting \$1,000."

CHAIR: "Is there a second to the amendment?"

Board Member C raises their hand.

CHAIR: "The chair recognizes Member C."

BOARD MEMBER C: "I second the amendment."

CHAIR: “It has been properly moved and seconded to amend the main motion by striking out \$1,500 and inserting \$1,000. Is there any discussion regarding the amendment?”

Board Member D raises their hand.

CHAIR: “The chair recognizes Member D.”

NOTE: At this time Member D can do 1 of 2 things:

- 1. Debate for or against the motion.**
- 2. Make another motion.**

Board Member D decides to make another motion.

BOARD MEMBER D: “I move to amend the amendment by striking out \$1,000 and inserting \$500.

CHAIR: “Is there a second to amend the amendment?”

Board Member E raises their hand.

CHAIR: “The chair recognizes Member E.”

BOARD MEMBER E: “I second the amendment to the amendment.”

CHAIR: “It has been properly moved and seconded to amend the amendment by striking out \$1,000 and inserting \$500. Is there any discussion regarding amending the amendment?”

Board Member B raises their hand.

CHAIR: “The chair recognizes Member B.”

NOTE: At this time the member can do one of 2 things:

- 1. Debate for or against the motion.**
- 2. Make another motion.**

And on it goes!

As the chair, the important thing to remember is that any discussion needs to focus on the motion at hand and not stray into other areas.



Wouldn't meetings be simple if everyone thought the same way and always agreed on everything?

Ha!

The entire reason that we have meetings is to get input from all the participants, so that we can come up with the best possible outcomes, and debate is central to that process. But, this process is not always smooth, especially when people have strong feelings about issues, or where there are important matters at stake.

A skilled and effective chair is able to allow everyone to express their opinions in a way that is civil and productive and which leads to action being taken and work getting done. Unfortunately though a lot of time is wasted in meetings because participants do not focus their debate properly.

If there is a main motion, amendment and amendment to the amendment on the floor, then to start with meeting participants should only be talking about amending the amendment. Once the amendment to the amendment passes or fails then all debate should be focused on the amendment, and once that passes or fails then the debate will turn back to the main motion.

I teach this "Pyramid of Precedence" in detail in the "PROCESS" section of the CHAIR WITH CONFIDENCE PROGRAM.

One thing to remember when managing member debate is that everyone gets the opportunity to speak once before anyone speaks twice about the motion on the floor.

Another thing you should do is make sure board members focus their debate on the specific motion on the floor and avoid straying off topic.

In our current situation where there is an amendment to the amendment on the floor, you should only be asking for debate/discussion on the amendment to the amendment. If a board member is given the floor and they begin to go off topic here are a few things you can say:

CHAIR: "I want to remind the board to please keep their debate focused on the motion at hand which is to amend the amendment. Is there any further discussion or debate about the amendment to the amendment?"

If a board member starts to get overly personal with another person you can say:

CHAIR: "Please keep all debate directed to the chair and avoid addressing one another directly. Is there any further discussion or debate about the amendment to the amendment?"

A vigorous and passionate debate is one sign of an engaged board and it should be encouraged. But, if you find you still need help keeping a handle on the debate in your meetings I encourage you to check out the final section in this document [HOW TO WORK WITH SUSAN], to learn more about how I can support you further.



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What to Say When - For Chairs



If debating is the sharing of ideas, then voting is all about making decisions. As the chair, it is crucial that you are able to confidently and effectively handle the voting process.

Voting Script

A board member finishes speaking.

CHAIR: "Is there any other discussion regarding amending the amendment?"

No one raises their hand to say anything.

CHAIR: "Seeing no further discussion, we will now vote on the amendment to the amendment which is to strike out \$1,000 and insert \$500. All those in favor of amending the amendment say aye. All opposed say no."

The board votes and the chair tallies the votes.

CHAIR: "The amendment to the amendment fails voice vote. We will now re-open discussion on the amendment which is to strike out \$1,500 and insert \$1,000. Is there any discussion regarding the amendment?"

Board Member A raises their hand.

CHAIR: "The chair recognizes Member A."

NOTE: At this time the member can do 1 of 2 things.

- 1. Debate for or against the motion.**
- 2. Make another motion.**

Debate continues. Eventually there is no further debate on the motion.

CHAIR:

“Seeing no further discussion we will now vote on the amendment which is to strike out \$1,500 and insert \$1,000. All those in favor of the amendment say aye. All opposed say no.”

The board votes and the chair tallies the votes.

CHAIR:

“The amendment passes, voice vote. We will now re-open discussion on the newly amended main motion which is to approve the request by the XYZ Club for \$1,000 of the funds raised during the Fun Run. Is there any discussion regarding the main motion?”

No one raises their hand.

CHAIR:

“Seeing no further discussion, we will now vote on the main motion which is to approve the request by the XYZ Club for \$1,000 of the funds raised during the Community Fun Run. All those in favor of the main motion say aye. All opposed say no.

The board votes and the chair tallies the votes.

CHAIR:

“The main motion passes voice vote. We will now move onto the next item of business on the agenda which is when to hold next year’s celebrity car wash. Is there a motion?”

When dealing with voting I always coach my chairs to slow down and remember the importance of repeating the motion prior to asking for a vote. This will help to keep everyone in the meeting on track.

What to Say When - For Chairs



There's an old piece of advice from Aristotle that I learned when I first started speaking professionally. According to Aristotle:

“Tell them what you are going to tell them, tell them, then tell them what you told them.”

Remember how I told you to start your meeting with the first half of a “bookend”. Well, now it is time for the other half of that “bookend”.

As you were getting your meeting started you told the board members what you wanted them to think or feel during the meeting. Well, now as the meeting adjourns, it is time to thank everyone for their participation and let them know that their work and energy is greatly appreciated.

This is a powerful and simple tool that will help end your meetings on an empowered note and which will let your board members know that as the chair, you appreciate what they have added to the meeting.

NOTE: Do this prior to officially adjourning the meeting.

Bookend Closing

CHAIR:

“Before we officially end today’s meeting, I would like to thank everyone for your work today. It is my hope that you leave this meeting feeling **seen, heard, respected** and **valued**. The work we are doing together is important and I thank you all for your participation.

With that said, if there are no objections, I call this meeting adjourned.”

Your job as the chair is to move through the agenda and keep the meeting on track, but it is also your job to set a powerful and positive context for HOW work gets done. The bookend is a simple and powerful tool to help you accomplish that.



If meetings always ran smoothly I wouldn't have a job and you wouldn't need these scripts. But we've all been in those meetings where:

- ***People arrive late;***
- ***There are frequent side conversations;***
- ***A board member won't stop talking;***
- ***Where people are being disrespectful;***
- ***And many other issues!***

These distractions might seem small, but as the chair, if you let too many of them slide without making an intervention, then the meeting gets knocked off-course and your board members end up getting frustrated.

To be an effective chair, you have to get good at making interventions during your meetings so that you can get things back on course and keep the meeting moving forward.

In the CHAIR WITH CONFIDENCE PROGRAM we deal a lot with how to handle difficult meeting situations and part of the program is my CHAIR WITH CONFIDENCE EBOOK that contains over 40 scripted examples of exactly what to say when you run into difficult board member behavior.

Here's an example of what you will find in my CHAIR WITH CONFIDENCE EBOOK:

Dealing With Personal Attacks

Indirect Intervention During the Meeting:

CHAIR:

"Since we are committed to maintaining a space in our meeting where people feel respected and valued. I want to remind everyone to direct your comments to the chair. "

What to Say When - For Chairs

Direct Intervention During the Meeting:

CHAIR:

"John, we are committed to maintaining a space in our meeting where people feel respected and valued. I want to remind you to please direct your comments to the chair. "

For the rest of the intervention scripts purchase the CHAIR WITH CONFIDENCE PROGRAM today!

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How to Work With Susan

I am passionate about helping boards run great meetings and there are 3 simple ways to keep working with me.

1- Sign Up For My Free Video Library

This is the quickest and most affordable way to learn more from me about how to chair meetings. Sign up for my FREE VIDEO LIBRARY on the homepage of the website and you will discover all sorts of powerful content about chairing and Robert's Rules of Order.

Sign up at:

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2- Buy the Chair With Confidence Program

The CHAIR WITH CONFIDENCE PROGRAM was specially designed to enhance your confidence and build your skill as a meeting chair. This one-of-a-kind online course is a learn at your own pace program full of videos, audio programs and eBooks to help make you the best chair you can be.

Learn more at:

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3- Work With Me as a Coaching Client

Government, association, corporate, university, houses of worship and more! I provide private coaching to chairs of all kinds of boards, and I have a variety of coaching packages available to meet your specific needs.

Whether you are brand new to chairing or just want to improve your skills, I can help!

Contact me at:

support@robertsrulesmadesimple.com

What to Say When - For Chairs

SUSAN LEAHY BIO

Susan Leahy MA.CSP is a loving, powerful, committed woman!

She is a professional speaker and coach who works with board members and board chairs helping them to save time, energy and life in meetings while getting more work done. She believes meetings should be fun!

Susan is the powerhouse behind Robert's Rules Made Simple, and Susan's live webinars and online training courses are used by thousands of boards across the US & Canada to run more effective meetings.

Some of Susan's course topics include:

- *Robert's Rules Made Simple Level 1*
- *Robert's Rules Made Simple Level 2*
- *How to Chair a Meeting with Confidence*
- *From Group to TEAM*
- *Healthy Board Dynamics*
- *Confident Public Speaking*
- *Leadership Bootcamp*
- *Women & Leadership*

She is a Certified Speaking Professional (CSP) and has a masters in applied behavioral science with an emphasis in coaching and consulting. She is a confidence and relationship coach and is the creator of "The Confident Woman Program".



Susan Leahy MA. CSP



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