

LEAGUE OF OREGON CITIES

CONDUCTING EFFECTIVE MEETINGS

A WORKBOOK FOR
CITY OFFICIALS

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A Workbook for City Officials

Prepared by:



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For more information,
contact the League of Oregon Cities, (503) 588-6550 or 1-800-452-0338
www.orcities.org

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PREFACE

How city councilors conduct themselves in the decision-making process can be as important as the decisions they make. The image a city council projects is important if citizens are to perceive their local government as competent, caring and conscientious. City council meetings are normally the venue from which the public forms its opinion of the city council. Thus, it is important that council meetings run smoothly and efficiently. This can only be facilitated when each councilor gains a thorough knowledge of their individual roles and the council as a whole.

Most city councils in Oregon have adopted resolutions or ordinances establishing rules of procedures for meetings. These rules are designed to promote efficiency and consistency when conducting council business and to avoid waste of council, staff, and citizen time. Rules commonly cover the time and frequency of meetings, order of business, method of designating the presiding officer and mayor pro tem, decorum and behavior, limitation of debate, voting, parliamentary procedure, preparation and distribution of agendas, and preparation for council meetings. An example of city council procedural rules may be found in the League of Oregon Cities' publication, *Handbook for City Councilors* or by accessing the League's web site at www.orcities.org.

In addition to a city's rules of procedures, public officials must answer to the State ethics agency (Oregon Government Standards and Practices Commission, or OGSPC). The ethics laws pertaining to public officials cover conflicts of interest, financial disclosure, use of office for personal gain, and other areas. Information covering these subjects can be found in the booklet, *A Guide for Public Officials*, published by the OGSPC. There are also other Oregon statutes which regulate the behavior of elected officials and public employees in a number of areas outside the jurisdiction of the OGSPC. ORS Chapter 192 establishes open meeting laws and requires that the public's business be done in public. These statutes are reviewed in the *Attorney General's Public Records and Meetings Manual*, which can be purchased from the Department of Justice. Becoming acquainted with the rules and regulations that govern municipal councils should be the very first step councilors take. Adhering to these regulations can safeguard decisions made by the council.

Simply following the rules and regulations governing a council, however, does not necessarily guarantee a well-run and effective council. Each councilor's conduct and behavior has a direct influence on how well the council performs as a whole. For example, a councilor who does not actively listen to fellow council members or citizens can give the impression that he/she does not care what people have to say. As a result, citizens might view the city as not valuing public input. Arguing during a public meeting and making personal attacks on citizens or fellow council members only serves the purpose of delaying or interrupting the proceedings. Not adhering to confidentiality policies, such as leaking sensitive information, can cause real harm and damage to the city's credibility. Making promises to citizens without the approval of a majority of the city council is a common failing. These examples illustrate some of the "pot holes" which can slow down and negatively affect the performance of city business.

All in all, councilors should conduct themselves to bring credit upon the City as a whole and to set an example of good ethical conduct for all citizens of the community. They should preserve order and decorum during council meetings and come prepared to negotiate, compromise, and work for solutions and goals that are best for all parties involved. Only in an atmosphere of cooperation can a city maintain mutual respect and trust.

This workbook, *Conducting Effective Meetings*, is an additional tool from which public officials can develop better skills at conducting and participating in meetings. Acquiring and using these skills will promote open and honest communication needed to foster team building and conducting the public's business in an effective manner.

INTRODUCTION

This workbook is intended to help city officials improve their skills in conducting and participating in meetings. It was developed by the League of Oregon Cities after a survey of city officials indicated that the subject of meeting skills was one of their top training needs.

Most city officials are not trained to run or be involved in the type of meetings common in city government. Most of us are taught to “think for yourself,” so the idea of group decision-making is not always comfortable. Furthermore, most officials receive no training at all in arriving at decisions in the “fishbowl” atmosphere demanded by law in conducting the public’s business.

If practiced regularly, the activities recommended in this workbook should help to build skill in four general areas. These are:

1. Skill in managing the time that you have during the meeting as well as between meetings, including:
 - coming to the meeting prepared to intelligently discuss the items on the agenda;
 - developing a workable agenda that doesn’t attempt too much nor waste time by covering too little; and
 - using a systematic approach to problem-solving.
2. Skill in involving citizens in the decision-making process by creating a climate that makes people feel welcome at meetings.
3. Skill in maximizing the potential of council, staff and citizens to solve problems. This is done by creating a climate of mutual trust and cooperation on the council and providing channels through which creativity of the citizens can be directed.
4. Skill at dealing with the hostile or disruptive individual.

These objectives, as well as the material contained in the workbook, are the results of information provided by many city officials consulted before preparing this material. The League has attempted to address the most common complaints expressed by those officials about why their meetings didn’t work and to offer some useful suggestions about conducting meetings more effectively.

CHAPTER ONE

Managing Between-Meeting Time More Effectively

Most successful meetings don't just happen. As a rule, luck, fate or good looks have less to do with the effectiveness of a meeting than do hard work and thorough planning. As a prelude to this chapter, examine the following questions.

1. Do all officials get a copy of the preliminary agenda at least one week prior to the meeting?
 Yes No

2. Is there an attempt to consult the members of the body before the agenda is finalized to see if there are additional topics?
 Yes No

3. Is there an attempt to provide a method of soliciting citizen input in drawing up the agenda?
 Yes No

4. Are members of the group provided adequate information about the nature, scope and background of each item?
 Yes No

5. Does the body have a method for setting priorities for the various agenda items?
 Yes No

6. Does the body have a method for allocating time to the various agenda items?
 Yes No

7. Is a consent agenda used for items that are not controversial?
 Yes No

If you answered "no" to any of these items, then an emphasis on planning for the meetings may help eliminate some problems.

The Agenda

Meetings should be planned following the doctrine of “no surprises.” This means that all of the participants should be aware of what items are apt to be on the agenda and have enough information to make good decisions about those items.

Ideally, a tentative agenda will be in the hands of the participants at least a week in advance of the meeting. A system of gathering feedback about the agenda should be established. Usually this system is an informal one where each participant who has a concern feels comfortable expressing that concern to the person preparing the agenda. If an informal system doesn’t exist, or if there is typically a large volume of business, a more formal system should be established.

A formal system gathers information about whether the participants feel that they have enough information to make a decision, whether the agenda contains too many items, and whether any of the participants has any additional items they wish to add to the final agenda.

In designing the agenda, thought should be given to the flow of the meeting. It should be kept in mind, for example, that the best quality decisions tend to be made early in a meeting when everyone is fresh.

Length of Meeting

Length of meetings is one of the most common complaints cited by city officials. Two factors should be considered when deciding how long the meeting should be: (1) few people can make quality decisions after meeting continuously for over two hours; and (2) most people don’t make good decisions after midnight. If either of these factors describes your meetings, you might consider the following suggestions when preparing the agenda:

1. Assign a time limit to each topic on the agenda. If all members of the group can be persuaded to follow a process for establishing time limits and sticking to them, you will accomplish just as much but in less time.

This is particularly true for public hearings. Most participants in a public hearing will adhere to time limits if they are reasonable and are fairly imposed. Have clearly established rules that are printed on the agenda and announced at the beginning of the meeting. There should also be a process for granting exceptions when needed.

2. Schedule recesses at two-hour intervals. These can be short and will not unnecessarily delay the progress of the meeting.
3. If meetings are regularly extending beyond midnight, consider having more frequent meetings. Other things may be tried to shorten meetings, but there comes a time in most cities when the volume of business grows to the point that more frequent meetings are necessary.
4. If not already in use, some consideration should be given to using a consent agenda. This tool allows several items that are not controversial to be passed with one motion. A process is established that allows any member of the group to request that an item be removed from the consent agenda and discussed separately. The consent agenda has allowed many cities to dispose of routine items with a minimal amount of discussion.

Evaluation Forms

A helpful item for presiders is a meeting evaluation form. This form is a good method of getting feedback on how the other participants think the meetings are being coordinated. If distributed periodically during a series of meetings, the form is helpful for guiding the presider in instituting changes to make the meetings more productive. A sample form is contained in the appendix that can be tailored to the needs of specific cities.

It is the responsibility of every meeting participant to come to the meeting prepared. Information must be made available far enough in advance of the meeting to allow for adequate preparation. Including items on the evaluation form about the quantity and quality of information sent out before a meeting may be helpful.

Between Meetings

It is suggested that you meet with the members of the group and draw up a timetable for accomplishing between-meeting tasks. Set deadlines for:

- (1) collecting meeting evaluation forms;
- (2) contacting resource people for your next meeting;
- (3) checking on the availability of special equipment needed for the next meeting;
- (4) soliciting agenda items, opinions on the priority of items, and time required for the next meeting;
- (5) distributing meeting agendas.

Set aside some time to meet with the members of the group to critique the meetings for the past two months. Focus the discussion on the agenda, specifically the number of items, the amount of time spent on each item, and how the agenda could be a more useful tool for helping the group to do its work.

Summary

The following are offered as suggestions for meeting participants:

1. Use meeting evaluation forms to gather data from participants on how to improve meetings.
2. Consider using a consent agenda for noncontroversial items.
3. Consider setting time limits on items on the agenda.
4. Make sure information about items on the agenda is sufficient and usable.
5. Consider more frequent meetings if meetings are lasting too long.
6. Set a schedule for contacting meeting participants between meetings. Communicate with them about the agenda and information from the evaluation forms. Get as much feedback about the upcoming meeting as possible.

CHAPTER TWO

Citizen Participation

How many of the following complaints have been directed at your group?

1. “They really weren’t interested in hearing what we had to say.”
2. “They already had their minds made up and it wouldn’t have mattered what we said.”
3. “That decision was so smooth, they had to have worked it out already before the meeting.”
4. “I get so nervous trying to speak into that microphone and looking up at them on the dais that I forget half of what I wanted to say.”
5. “When I come to the meeting they always look at me as if to say ‘What, him again! I wonder what he wants this time.’ I feel like I shouldn’t have bothered.”

How many of the following complaints have you made about citizens appearing before your group?

1. “They ask us to do the impossible and then accuse us of not listening when we don’t do the impossible.”
2. “I get tired of a whole line of people who feel they have to speak and then say the same thing over and over again.”
3. “Why doesn’t everyone ever show up when we are making important policy decisions? They only come when they’re directly affected and usually when it’s too late to do what they want.”
4. “We have one guy who comes to every meeting. I think he must be running for something.”

Involving citizens in the decision-making processes of the city is a desirable yet frustrating exercise in participatory democracy. For some people, an appearance before the city council or the planning commission is the sole experience on which to base how effectively the city is being run. Many times that experience is frustrating for both the citizen and the officials. However, with a little work, city officials can make the experience less frustrating.

The Meeting Process

People may be intimidated by what they don’t understand. Copies of the agenda should be made available, and a form can explain normal procedures.

Using a sign-up sheet for persons wishing to speak has some value, particularly if there is a process for follow-up. In addition to having space for the usual (name, address, etc.) the sign-up sheet should have a place for the person to indicate interest in a particular item on the agenda and whether the person intends to speak on that item. In some cities, one person is assigned the task of sending out follow-up letters to people who speak at meetings. These letters usually thank them for participating and may offer additional information if they have indicated an interest in a particular topic.

The person conducting the meeting has a special responsibility for making people feel welcome. The presider should start each meeting with a short welcoming statement, explain procedures, and introduce the members of the group and any staff that will play a role in the process.

As the meeting progresses, the presider should give a progress report on which agenda item is being discussed. This is helpful to someone not familiar with the process. The presider also should set a friendly tone to the meeting so that citizens who are speaking will feel at ease.

Getting Feedback

A “citizen information form” may be helpful in getting feedback about how meetings are perceived by the citizens. These can be used periodically during the year, and the information accumulated can provide input about areas that need improvement. For purposes of circulation, they can be stapled to the copies of the agenda that are given to the audience. Reviewing these forms should become a regular part of the between-meeting routine. A sample form is included in the appendix.

Much citizen reaction to a particular meeting depends on whether those attending got what they wanted. If the decision was disappointing to many of those in the audience, they are apt to be critical of the process. When evaluating citizen information forms, look for trends and put that information in perspective.

Summary

1. Make people feel welcome. This responsibility falls primarily on the presider.
2. Use a sign-up sheet and follow up with additional information if requested.
3. Make sure everyone gets an agenda and that they are kept aware of the progress of the meeting and the procedures being followed.
4. Use a citizen information form for feedback on the reaction of the audience to the meetings.

Suggested Activities

1. Evaluate the current methods used to involve citizens in the meetings. Are they satisfactory? Hold an open discussion with the group about this issue, using information from the citizen information form.
2. Along with the group, attend meetings of similar groups in nearby cities. Compare their meeting format with yours and see if there are ideas you can borrow.

CHAPTER THREE

Systematic Problem Solving

How many of the following are true for your group?

1. The group doesn't clearly state or agree on the objectives of an agenda item before beginning to discuss it.
2. Members of the group don't produce enough helpful ideas when a problem is encountered.
3. The group sometimes fails to thoroughly discuss an agenda item until it is satisfactorily resolved.
4. Sometimes a conflict between group members gets so intense that discussions are counter-productive.
5. The group sometimes discusses an item, but fails to take action or agree upon a course of action.
6. Some members of the group tend to go off on tangents or raise irrelevant points.
7. Sometimes even after arriving at a particular decision, it is still discussed over and over.
8. Sometimes members of the group refuse to participate in implementing a decision that the group has agreed on.

If these problems sound familiar, analyze the process used for making decisions. What follows is a suggested format for dealing with issues in an orderly and systematic way. This recommended procedure offers some help in structuring a group's discussion in a more productive fashion.

Step 1 - Define the Problem

Some issues present themselves as a conflict while others do not. Begin deliberations by defining the nature of the issue, and making clear the purpose of the discussion.

One helpful technique for determining the limits of an issue facing the group is to examine it from the perspective of an "open-ended" question. For example, faced with concern over a deteriorating downtown area, begin the discussion by asking, "To what extent, if any, do we have a problem with our downtown area?", as opposed to a question like, "Should we establish landscaping standards for the downtown area?" The closed-ended question focuses on solutions to the problem without defining its nature.

Another approach is to ask the group to generate a list covering all the things known about the problem. The list might be grouped by the scope of the problem, the effect of the problem, and the timeline of the effects occurring. A second list is then made of items that the group believes

are not part of the problem. When the two lists are compared, a fairly clear picture of exactly what the problem is can be developed. Additionally, the group is made more aware of what assumptions can and cannot be verified by others. This is helpful in separating fact from opinion.

The tendency during this and subsequent phases is to offer solutions immediately without benefit of sound investigation and analysis. By focusing on solutions too early, it is easy for the group to split up into subgroups, with each “owning” a particular solution. This makes the task of finding a solution that everyone can live with almost impossible.

Step 2 - Determine How to Attack the Problem

Having determined what the problem is and what it isn't, determine whether the city has the means to solve the problem. At this stage the problem may be entirely beyond the scope of the group's responsibilities, or further resources may be needed to generate more information.

The question now should be, “what information is needed to discuss solutions?” Identify sources of additional information.

Step 3 - Generate Alternatives

A good rule of thumb is that the group can never have too many alternatives to consider. During this phase of the discussion, prevent premature evaluation of a proposal. Sometimes, suggestions that seem absolutely ridiculous at first turn out to be more reasonable than they seemed. Even a silly proposal can trigger a genuinely workable solution in someone else's mind.

It is the responsibility of the presider to protect members of the group and their ideas from being attacked by other members. Don't let any member dampen the creative impulses of another member.

Consider these ground rules:

- everyone tosses out as many ideas as possible;
- all ideas are considered;
- no one is allowed to criticize or evaluate any idea until the brainstorming session is officially over.

Used properly, brainstorming can release the creative problem-solving talents of the group. It encourages each member of the group to speak his or her mind without fear of criticism.

The presider has several responsibilities during a brainstorming session. The presider must:

- focus the discussion by reminding the group of the agreed-upon scope of the problem;
- set goals for completion of the tasks;
- draw out members who aren't participating;
- enforce the ground rules;
- bring closure to this phase when the ideas are exhausted.

Step 4 - Evaluate the Alternatives

The important point to remember at this stage is to not accept or dismiss an alternative too quickly or uncritically. A good technique for guarding against this tendency is the “three times one” approach. This approach requires that three positive statements be given about a proposed solution before a negative statement can be given.

If the group tends to offer too few alternatives or wants to accept the first idea too quickly, then the “three times one” approach can be reversed. In this instance, three negative statements must be made before a positive one can be made.

The key to evaluating alternative solutions is to be both thorough and critical. The presider must develop a sense for when those goals have been reached and the process can continue. The presider may use the technique described above or a less structured process, until it is clear that the group has finished the evaluative stage.

Step 5 - Select the Best Alternative

Before finally settling on a specific solution, examine the pros and cons of the most popular alternatives. Have someone keep a list of the various reasons for accepting a particular solution and another list of the reasons for rejecting it.

Make lists for each alternative that is appropriate for the problem. Put the lists side by side and compare them. This process forces the group to be thorough and critical. It also puts everyone on record as fully understanding the consequences of the group’s ultimate decision. Accountability encourages responsibility.

Caution: Don’t overlook the fact that the best solution might be a combination of a number of proposals. Encourage the group to be creative.

Step 6 - Take Steps to Implement the Solution

Part of the process of evaluating and selecting the best solution involves an assessment by the group of its ability to implement the solution. Assuming that the solution selected is one that can be implemented, proceed with that step.

Caution: Often it is a staff responsibility to develop plans for implementation once the best alternative has been chosen. The group should discuss implementation strategies with the city manager or administrator before concrete plans are made for implementing the solution.

Step 7 - Develop Criteria for Evaluation and Evaluate

An essential ingredient of any program or plan, and one that is neglected too often, is performing an evaluation. It is necessary to develop criteria to be used to judge the final outcome before the

actual evaluation takes place. Responsibility for developing the criteria and for evaluating the solution should be assigned to an individual or a committee immediately after the group has agreed on the best solution to be problem.

A Final Note: This process is only an outline of a fairly detailed approach to problem solving. Clearly, not every decision that the group is asked to make has to be run through this process. The important thing is to develop a process or several processes that the group has confidence in using.

Summary

1. The first step in systematic problem solving involves defining the problem. Groups should avoid beginning with a discussion of the relative merits of various alternative solutions.
2. Once the problem has been defined, consider as many alternative solutions as practical.
3. In implementing a solution, specific responsibilities should be assigned and criteria for evaluation should be established.

Suggested Activities

1. Analyze the group's agendas for the last two months and see if the process for solving each problem was rational. If not, develop a strategy for some problems that may occur in the future.
2. Have your group practice a brainstorming session. Select a hypothetical issue and set aside 10 to 15 minutes to run through a practice session.
3. Practice the "three times one" approach to assess various solutions to a particular problem.

CHAPTER FOUR

Dealing with Disruptive Individuals in Meetings

Which of the following types of disruptive behavior has your city experienced during meetings?

1. Someone from the audience asks to speak on a subject just as the group is about to make a decision.
2. Members of the audience begin to debate with each other while the group is trying to make a decision.
3. A member of the audience becomes threatening or abusive during public testimony.
4. The audience becomes noisy while the group is trying to complete discussion on a topic.
5. A member of the audience rises to make a motion during discussion on a topic.
6. A member of the group continually interrupts while others are trying to speak.
7. A member of the group always plays to the audience by making speeches that appeal to the emotion of the audience rather than contribute to the rational discussion of the topic at hand.
8. A member of the group constantly challenges the other members of the group on their sources of information.
9. A member of the group constantly engages in personal attacks against another member of the group.

These and other situations occur regularly in public meetings. In each instance, they are disruptive in that they detract from the real purpose of the meeting. And, in each instance, they require action from the presider to keep the group focused on their appointed task.

Without a doubt, one of the most difficult problems facing a group is that of dealing with people who disrupt the proceedings. The disruptors may be people in the audience or they may be members of the group itself. It is essential that the presider have a variety of responses in these situations in order to keep control and to achieve the objectives of the meeting.

Disruptive Members in the Audience

Keep a couple of facts in mind when dealing with members of the audience. First of all, the Open Meetings Law requires that meetings be held in public; it does not give the public the right to participate in the meetings. The body has the right to set the rules under which the meeting will proceed. Second, a member of the audience may be excluded from the meeting if that person is being actively disruptive. Remind the audience of these legal distinctions as the need rises.

Dealing with possible disruptions in a meeting is easier if some of the suggestions made in the chapter on Managing Between-Meeting Time have been followed. The better prepared the body is going into a meeting, the less likely that someone will successfully disrupt it.

Reviewing the rules before the meeting starts, either with a written sheet attached to the agenda or with an oral review by the presider at the beginning of the meeting, can be particularly helpful. People tend to be willing to follow the rules when they understand them and feel they are fair. They are more apt to be disruptive if the rules seem to be imposed unfairly (the impression that they get if the rules aren't explained from the beginning).

People may become inadvertently disruptive in situations where they feel uncomfortable. Again, concern for making the meeting room as comfortable as possible and for making sure that everyone has an agenda so they know what's going on will help to eliminate some of the incidental disruption inherent with a large audience.

A review of the agenda for the meeting will almost always reveal the items that are apt to be controversial enough to cause disruption. The staff may have some additional contact with individuals that will give them a clue as to which items or individuals have disruptive potential. This information may help get you mentally prepared and allow you to anticipate trouble.

Those people who lead public meetings must develop thick skins when their own ego is concerned. One good technique for defusing hostility directed at the presider is to meet it with exaggerated courtesy. The technique of "fogging" is sometimes helpful. This is the technique of agreeing with anything the individual might direct at the presider, no matter how derogatory it might be. Such a technique, however, is not appropriate if the attack is aimed at another member of the group. If the presider is to retain credibility with the group and with the rest of the audience, he/she has a responsibility to protect other members of the group and even other members of the audience from personal attacks.

Disruptive Members of the Group

Dealing with disruptive behavior from another member of the group is a different, and often, more difficult matter. Each member of the group has the right to expect a certain degree of sovereignty over their own behavior. Unlike the audience, they have the right to participate. The problem is to convince them that they also have a responsibility to behave in a manner that helps further the goal of the group.

If disruptive behavior is defined as any behavior that detracts from the ability of the group to conduct its business, then almost every member is, at one time or another, disruptive. However, in some cases, a member of the group will display regular disruptive behavior. Then it becomes the responsibility of the group to correct that behavior.

As with most of the problems that have been discussed, the problem of the disruptive group member is best dealt with between meetings. Usually the responsibility falls most heavily on the presider.

The presider may find it necessary to sit down with the individual between meetings and discuss the problem. The following are some guidelines that may be helpful:

1. Be as descriptive as possible. Avoid using judgmental or evaluative language.
2. Try to avoid becoming argumentative, angry or defensive.
3. Look for workable compromises that allow everyone to save face, yet will result in a more effective group.
4. Try to determine if there is an underlying cause of the problem. Often, the disruptive behavior is a response to a situation about which the rest of the group may be unaware. In these instances it may be possible to eliminate changing something about the way the group operates.
5. Try to view the problem from the other person's perspective. Be willing to accept the truth that may be contained in that perspective.

Usually this kind of conversation before the meeting will eliminate the problem. But, in some cases, it may become necessary to confront the disruptive behavior during a meeting. The following are some suggestions for dealing with this problem.

1. Paraphrase the individual's comments. This technique has several advantages.
 - It may clarify what the person is saying.
 - It may help the individual to understand that what he or she is saying is absurd or repetitious.
 - It helps make clear to other members of the group and to the audience that the presider is making an effort to be fair.
 - Restating a person's thoughts may produce more empathy with his or her position.
2. In many instances, disruptive behavior occurs as a result of allowing a discussion to turn into a debate. This type of disruption might be avoided if the presider of the group restates the issue in a way that will keep group members from choosing sides.
3. Refuse to argue with the disruptive individual. Try instead to direct all discussion to the identification and solution of common problems.
4. When confronting a disruptive individual, try to uncover the underlying motive of the behavior. If that is possible, it might be good to allow the person to express the problem and clear the air.

It is always easier to deal with disruptive behavior between rather than during meetings. One good between-meeting activity might be to conduct a discussion of process. In this discussion, have the group set ground rules for good process. Then if a problem occurs during the meeting, the presider has the authority to refer to previously agreed-upon rules to help keep the group directed towards constructive behavior.

The use of the meeting evaluation form mentioned earlier might help the group and the presider to anticipate problems. If the information in the form is used to regularly monitor process, some problems might be avoided.

Summary

1. Disruptive behavior is easier to correct if it is anticipated. This means that the more planning that goes into a meeting, the more likely the meeting is to be successful.
2. Paraphrasing is a good technique to use in instances of disruptive behavior.
3. Try to identify underlying motives for disruptive behavior. Sometimes motives are easier to correct than the behavior itself.

Suggested Activities

1. Review the group's meetings for the last two or three months. See if there was a pattern of disruptive behavior. If there was, try to develop a strategy for how to deal with repetition of that behavior.
2. Schedule a discussion with the group regarding process. Try to get them to set ground rules for appropriate behavior.
3. Try using a meeting evaluation form for a few meetings and see if any previously unstated complaints that might explain disruptive behavior are exposed.

CHAPTER FIVE

Parliamentary Procedure

The following are important terms to remember in parliamentary procedure:

1. **Take Precedence**. If a motion takes precedence, it means that it is in order for that motion to be made and considered, even though other motions may be pending.
2. **Pending**. An uncompleted action before the group.
3. **Discussion**. Consideration of a motion by members of the group. Discussion never precedes a motion.
4. **Debate**. Another term for discussion.
5. **Main Motion**. A motion designed to bring the subject before the group for consideration. A motion that brings up business when no other motion is pending is considered a main motion. Only one main motion should be pending at any time.
6. **Incidental Motion**. A motion arising out of the course of the group's business that has a relationship to the question immediately pending. It takes precedence over the pending motion and must be decided first. This type of motion may include motion to suspend the rules, points of order, and points of information.
7. **Subsidiary Motion**. A motion that modifies, delays action upon, or disposes of a main motion. These motions would include amendments, a motion to postpone indefinitely, and a motion to lay on the table.
8. **Privileged Motion**. A motion that is not related to the pending motion but has urgency and importance that demands immediate consideration. These motions include questions of personal privilege, motion to recess, and motion to adjourn.
9. **Quorum**. The smallest number of members of the group that must be present before the group can legally conduct business. This number is used in the context of open meetings laws to determine when a gathering is a meeting.

Parliamentary procedures have been used for centuries in situations where a definite decision must be clearly formulated. Often a group can only be sure of how its members feel about a particular action if they take at least two steps:

1. The proposal must be formulated as a resolution or some statement indicated proposed action; and

2. The resolution must be tested by a vote to determine whether or not the group supports it.

Parliamentary procedure provides a means for taking these two steps and is also useful in guiding the entire proceedings of a group in an orderly fashion.

The crucial point to keep in mind as you read through the following discussion is that parliamentary procedure is intended as a tool to facilitate democratic discussions and decisions. It is not intended as a weapon to silence your opponents or railroad decisions.

The following points are not intended as an exhaustive dissertation on parliamentary procedure, but rather as a highlight of some of the more troublesome parts of that procedure. Several good guides to parliamentary procedure exist and anyone who is responsible for conducting meetings regularly may want to acquire one or two.

1. Consider only one question at a time. A question is introduced by a motion. It must be seconded and should be restated by the presider before it is discussed. Once a question is before the group, it must be properly disposed of before another question is considered.
2. Subsidiary or secondary motions sometimes cause some confusion. These motions depend upon the main motion. Any of these motions may be made while the main motion is pending. Further, subsidiary motions may be made while one or more of the other motions are pending. The following are subsidiary motions.
 - A. Postpone Indefinitely. This is a debatable motion and the main motion to which it applies remains debatable while it is being considered. Tactically, this motion has nothing to do with postponing, but is a way of defeating the motion under consideration. It can sometimes be used for continuing discussion when the speaking privileges of members discussing the main motion have been exhausted.
 - B. Amendment. This is debatable if the main motion to which it refers is debatable. Amendments must be clearly related to the main motion and may make changes by inserting, striking out, or substituting words, but may not reverse the intention of the original motion.
 - C. Refer to a Committee. This is a debatable and amendable motion. Its purpose is to refer a main motion and its amendments, if any, to a committee for special study and recommendations. The motion to refer should include how the committee is to be selected, when it should report, and whether it is to report facts or make recommendations or both.
 - D. Postpone to a Certain Time. This is not debatable except as to the propriety of postponement. It is amendable only with regard to the time. If the postponement is to the next meeting, the postponed motion automatically comes up as unfinished business.
 - E. Limit or Extend Debate. This is not debatable and may be amended as to the number of times a speaker may speak and as to the length of time each may speak.

- F. Previous Question. This is not debatable or amendable. The purpose of this motion is to terminate debate and move to an immediate vote on any motion to which it is applied. The proper form to use in making this motion is to say, "I move the previous question on the immediately pending (or on all pending) question." The presider then states that the previous question is moved and seconded and calls for a vote.
- G. Lay on the Table. This is not debatable or amendable. The purpose of this motion is to lay a motion aside temporarily without postponing it to a certain time. The motion laid on the table may be brought again before the group by a simple motion to take it from the table. This has the status of a main motion. A motion may be taken from the table any time before the end of the next meeting after the one at which it was laid on the table. If it is not removed from the table before the end of the next meeting, the motion ceases to exist.
3. Incidental motions develop out of situations that are in some way related to the discussion that is going on. They may be made whenever they are needed and have no order of precedence among themselves. Any one of them takes precedence over a main motion or a subsidiary motion but is lower in precedence than a privileged motion. Incidental motions are not debatable. Following are several of the more commonly used incidental motions:
- A. Point of Order. This is raised when a member of the group feels that the rules of order have been violated. After the member states their concern, the president must rule either "Your point is well taken," or "Your point is not well taken." The presider gives a decision and corrects a mistake if one has been found. It is good practice for the presider to explain the reason for the decision to avoid confusion.
- B. Appeal the Decision of the Presider. This action may be taken whenever a member of the group believes that the presider has given a wrong parliamentary decision. The member states the reason for the appeal and then the presider should move to an immediate vote. A simple majority vote against the presider is required to overrule the decision.
- C. Suspension of the Rules. The purpose of the motion is to temporarily set aside the normal practices of the group. It cannot be used to suspend a provision of a constitution or bylaws. It is most often used to alter the order of business.
- D. Division of the Question. This may be amended but may not have any other subsidiary motions applied to it. The purpose of this motion is to separate a motion into separate parts and consider each of those parts individually.

Summary

1. Parliamentary procedure is intended as a tool rather than a weapon.
2. An orderly process demands that only one issue be debated at a time.
3. Subsidiary and incidental motions are intended to provide flexibility in the process. They should not be misused or used to confuse the process.

Suggested Activity

Review the use of parliamentary procedure during the last couple of months. See if it conformed with the guidelines laid out above.

CHAPTER SIX

Presenting Oral Reports

No workbook for city officials about meetings would be complete without a section of giving reports. Much of the meeting time is spent giving or listening to oral presentations.

Unfortunately, there are no magic rules that can guarantee success in getting a point across. This is because communication is a complex human event. It involves a number of factors, all of which change from speaker to speaker and from audience to audience.

Although there are no magic rules, there are some principles of effective oral presentations which may help improve report-giving ability.

1. **Understand Your Audience.** This may be the most important element in successful oral communications. Before preparing a report, some key questions about the group to whom the report will be given.
 - A. Why do they need this information? How important is it that they understand and believe what is being said?
 - B. How much do they know? How much background is needed?
 - C. How do they feel about me? Do I have much credibility with them or do I need to support most of the things that I say?
 - D. What “language” do they speak? What terms, slang, or jargon will they understand? What words, phrases, or concepts will I have to explain or define?
 - E. How many people will be in the audience. Will I need a microphone or can I speak more informally?

The point to keep in mind is that the more known about the audience, the less likely a needless mistake based on false assumptions will be made.

2. **Keep it Simple.** Make what is said and how it is said simple. Avoid presenting too much new information at any one time. Three or four new ideas are about the most a large group can digest at any one time. If there is a need to present more ideas, try to break up the presentation into three or four very broad categories and relate several subordinate points or ideas to these broader categories.

Information seems to be retained best when it follows several rules of simplicity:

- A. Things explained from top to bottom are more easily understood and remembered than concepts that are explained from the bottom to the top.

- B. In explaining a sequence of events, present the sequence from beginning to end rather than starting at the end and working backward.
- C. Audiences understand comparisons more easily when they are presented positively rather than negatively. For example, saying, “parcel A is larger than parcel B” is more easily understood than saying, “parcel B is smaller than parcel A.”
- D. Generally, active sentences are more easily understood than passive sentences. “The council passed the resolution” for example, is better than, “The resolution was passed by the council.”

Keep in mind that the report is probably going to be heard only once, so keep it as simple as possible.

- 3. Use “guide phrases” to lead the audience through the speech. These phrases include:
 - A. Frequent transitional phrases that provide a bridge from one set of ideas to another. Phrases like: “Now that I’ve shown you...” or, “Next I want to talk about ...” will serve to keep the audience on track. Even terms such as “first,” “second,” and “also,” “although,” and “however,” all help the audience follow the thought pattern.
 - B. Transitional “markers” will aid audience comprehension. Use of such markers will provide a kind of “sign post” for the audience. Numbers and letters are the most frequently used, but phrases like, “The third part of this report is...” or, “The final example I’d like to give you this evening is...,” help focus the audience’s thinking on the major points around which the presentation is organized.
 - C. Repetition, restatement, and the use of internal summaries are three excellent organization devices that help listeners better follow the presentation. Don’t hesitate to use these techniques for fear that it will make the presentation seem simple or elementary. Remember, the audience will hear the report just this once and probably will need all the help it can get.
- 4. Don’t overlook the importance of introductions and conclusions. As a rule, the introduction to any report should be an excellent opportunity to get the audience’s attention, orient them to the approach taken in the report, and prepare them to listen intelligently.

A sure-fire way to get someone’s attention is to tell them why they ought to be interested in what you have to say. In other words, tell them how the information in the report affects them. Make them want to listen.

Preparing any group to listen intelligently to an oral report involves two tasks:

- A. Define any terms or clarify any concepts that need to be understood or appreciate what you’re going to tell them.
- B. Give a brief preview of the main points the report will cover. This is very helpful in preparing the audience to comprehend what you’re saying.

At the other end of the speech, there should be a conclusion. This means more than just saying, "that's all, folks." An effective conclusion will try to provide the audience with a sense of closure. There should be a feeling that you've done everything you set out to do and it's time to end.

Try to avoid anti-climatic or abrupt endings. This can be accomplished and at the same time reinforce the speech if the main ideas of the report are summarized.

In short then, the best advice for organizing a report is, "Tell 'em what you're going to say; then tell 'em; then tell 'em what you told 'em."

5. Don't keep secrets from the group to whom you're giving the report. Tell them how or why you reached the conclusions you reached. Explain to them what reasoning you used, what evidence you used, who's opinion you relied on, and, in short, what caused you to come to the conclusion you came to. These reasons may be as important to the group as the conclusions themselves. Don't assume that they already know or don't want to know.
6. Visual aids can be helpful in getting and keeping a group's attention and in aiding its ability to understand what your point is. Consider these tips when using visual aids.
 - A. Is the aid large enough to be seen and understood by everyone in the room?
 - B. Is the aid simple and clear?
 - C. Is the aid relevant to what you're talking about?
 - D. Test the equipment before using it.
 - E. Make sure the aid is ready to go when you are ready to use it.
 - F. Practice the report as much as possible using the aid.
 - G. Make sure you understand the aid.
7. Dealing with questions is another important skill to develop. Here are three techniques, each of which has advantages and disadvantages.
 - A. Taking questions at the beginning of your report may give you the precise information you need to adapt your presentation to a specific group. In order to use this technique effectively, you must have a good understanding of your subject matter. You have to be able to think and react quickly. You'll also want to be sure to answer all the questions. The defect in this technique is that the report may raise questions that the group won't have thought of before they heard it.
 - B. Taking questions during the report can work well if the group is small and you want to keep the presentation informal. Moreover, it helps maintain the group's attention and is a good way to find out if you're getting your point across. Be careful that you don't get bogged down with questions and not be able to finish the report.

- C. Take questions after the report is finished. This has the advantage of allowing you to finish the report without interruptions. It also allows anyone in the audience to leave if they aren't interested in the questions. The weakness of this technique is that, if you have lost or misdirected the audience, you won't know it until the end.

The point to remember in handling questions is that you should decide how to handle them. It should be a conscious decision on your part and not something decided for you by the audience. State how you will handle questions at the beginning of your report.

- 8. Your delivery can make a great difference in whether or not the report is understood and appreciated. Here are some tips that may help you improve your delivery.
 - A. Look at the audience. Avoid turning your back on people and try not to bury your head in your notes. Eye contact helps get and maintain attention. Also, looking at the audience provides non-verbal feedback about how well they are understanding what you're saying.
 - B. Don't use a table, podium, or microphone unless you have to. These tend to increase the psychological distance between the speaker and the audience. They also increase the likelihood that you'll lose attention.
 - C. Although it's good to have movement in your presentation, try to avoid pacing or shuffling your feet. These two nervous habits, along with excessive vocalized pauses (such as "uh", and "um" and "you know"), are guaranteed to drive an audience to distraction.
 - D. Vary the rate, volume and pitch of your voice during the presentation. Fast or slow is fine as long as there is some variety.

Summary

Oral presentations are a fact of life for city officials. The only way to get good at giving them is to practice. The more you practice, the better you'll get.

Suggested Activity

Volunteer to give at least one oral report in the next month. Prepare the report according to the guidelines presented above.

APPENDIX A

A Sample Meeting Evaluation Form

NOTE: This is a sample form that is intended as a guide to give the presider of the group a better idea of how the members of the group feel that key elements of the meeting process are going. It can be amended and varied in terms of length and the questions asked. The idea is to use some similar tool to get information of this type.

1. Did you receive the agenda sufficiently in advance of the meeting to allow adequate preparation for the meeting? Yes No
2. Were there too many items on the agenda? Yes No
3. Was there an adequate amount of time allotted for each item? Yes No
4. Were agenda items correctly prioritized? Yes No
5. Did the discussions carry through to conclusions? Yes No
6. Did the discussions stay on track? Yes No
7. Were enough alternatives discussed before a decision was reached? Yes No
8. Was effective use of staff made? Yes No
9. Did some people talk too much? Yes No
10. Was any one person allowed to dominate the meeting? Yes No
11. Was everyone encouraged to participate? Yes No
12. Were there any distractions that detracted from the discussion? Yes No
13. Was there a satisfactory use of parliamentary procedure? Yes No
14. Did you receive adequate information prior to the meeting to be able to make decisions? Yes No
15. Were reports adequate and helpful? Yes No

APPENDIX B

A Sample Citizen Information Form

NOTE: Like the sample meeting evaluation form, this form can be a useful tool. It should provide information to increase the effectiveness of the group in dealing with the public. This is a suggested form and should be tailored to meet the needs of the group.

1. Would you like to be on our mailing list to receive future agendas and other information? If so, please give name and address.
2. Are these meetings held at a convenient time for you? If not, what time would be more convenient?
3. To help this group better serve your needs, we'd like you to take a few minutes and answer the following questions.

Date attended: _____

Did the meeting start on time? Yes No

Were the facilities comfortable? Yes No

Were there any distractions that kept you from understanding what went on?
If yes, what were they? Yes No

Did you get a copy of the agenda? Yes No

Was it helpful? Yes No

Were you able to identify the members of the group? Yes No

Did you understand the process well enough to follow what went on? Yes No

Did the person who presided over the meeting to a good job? Yes No

Did you speak at the meeting? Yes No
If yes, were you treated courteously? Yes No

Please use the back of this sheet for any additional comments.

APPENDIX C

Attorney General Guidelines

The following guidelines have been reprinted with permission from the Attorney General's *Public Records and Meetings Manual*, December 2005. This publication is updated approximately every two years, following each legislative session. To purchase a full copy of the publication, contact:

Oregon Department of Justice
1162 Court St. NE
Salem, OR 97310-4096
Phone: (503) 378-2992

Guide to Bodies Subject to Public Meetings Law

This is a simplified guide to understanding when the meetings of a particular body are subject to the Public Meetings law. For a discussion of the various elements, refer to the text of the Attorney General's *Public Records and Meetings* manual.

Is it a body with two or more members?  No

Yes ▼

Is the body a "public body"?
- the state - a regional council
- a county - a district
- a city - a municipal or public corporation
or an agency of any of the above, such as:
- a board - a department
- a council - a commission
- a bureau - a committee
- a subcommittee - an advisory group  No

Yes ▼

Does the body have authority to:
- make a decisions(s) for
- make a recommendation to
a public body (including itself) on policy or administration?  No

Yes ▼

Is a quorum required to make that decision or to deliberate?  No

Yes ▼

Is the body meeting to:
- make that decision (see ORS 192.610(a)),
- deliberate toward that decision, or
- gather information upon which to make that decision
or to deliberate toward that decision?  No

Yes ▼

The Public Meetings Law applies

Public Meetings Checklist

The Public Meetings Law applies to all meetings of a quorum of a governing body of a public body for which a quorum is required to make a decision or to deliberate toward a decision on any matter. This checklist is intended to assist governing bodies in complying with the provisions of this law; however, you should consult the appropriate section(s) of the Attorney General's *Public Records and Meetings* manual for a complete description of the laws' requirements.

- OPEN TO THE PUBLIC. Unless an executive session is authorized by statute, the meeting must be open to the public.

- NOTICE. The governing body must notify the public of the time and place of the meeting, as well as the principal subjects to be discussed. Notice should be sent to:
 - News Media
 - Mailing lists
 - Other interested persons

The notice for regular meeting must be reasonably calculated to give "actual" notice of the meeting's time and place. Special meetings require at least 24 hours notice. Emergency meetings may be called on less than 24 hours notice, but the minutes must describe the emergency justifying less than 24 hours notice.

- SPACE and LOCATION
 - Space. The governing body should consider the probable public attendance and should meet where there is sufficient room for that expected attendance.
 - Geographic location. Meetings must be held within the geographic boundaries over which the public body has jurisdiction, at its administrative headquarters or at "the other nearest practical location."
 - Nondiscriminatory site. The governing body may not meet at a place where discrimination on the basis of race, creed, color, sex, age, national origin or disability is practiced.
 - Smoking is prohibited.

- ACCESSIBILITY TO PERSONS WITH DISABILITIES
 - Accessibility. Meetings must be held in places accessible to individuals with mobility and other impairments.
 - Interpreters. The governing body must make a good faith effort to provide an interpreter for hearing impaired persons.

- Americans with Disabilities Act (ADA). The governing body should familiarize itself with the ADA, which may impose requirements beyond state law.

- VOTING. All official actions by governing bodies must be taken by public vote. Secret ballots are prohibited.

- MINUTES and RECORDKEEPING. Written minutes must be taken at all meetings except executive sessions, which may be tape recorded. Minutes must include at least the following:
 - Members present;

 - Motions, proposals, resolutions, orders, ordinances and measures proposed and their disposition;

 - Results of all votes and, except for bodies with more than 25 members unless requested by a member, the vote of each member by name;

 - The substance of any discussion on any matter; and

 - A reference to any document discussed at the meeting. (Reference to a document exempt from disclosure under the Public Records Law does not affect its exempt status.)

The minutes or alternative recording must be available to the public within a “reasonable time after the meeting.”

For executive sessions, see separate **Checklist for Executive Session** (page 32).

Checklist for Executive Session

This checklist is intended to assist governing bodies in complying with the executive session provisions of the Public Meetings Law; however, you should consult the appropriate section(s) of the Attorney General's *Public Records and Meetings* manual for a complete description of the requirements.

- Provide notice of an executive session in the same manner you give notice of a public meeting. The notice must cite to the specific statutory provision(s) authorizing the executive session.

Permissible grounds for going into executive session are:

- (a) To consider the employment of an officer, employee, staff member or agent if: (i) the job has been publicly advertised, (ii) regularized procedures for hiring have been adopted, and (iii) in relation to employment of a public officer, there has been an opportunity for public comment. For hiring a chief executive officer, the standards, criteria and policy to be used must be adopted in an open meeting in which the public had an opportunity to comment. This reason for executive session may *not* be used to fill vacancies in an elective office or on any public committee, commission or other advisory group, or to consider general employment policies. ORS 192.660(2)(a) and 192.660(7).
- (b) To consider dismissal or discipline of, or to hear charges or complaints against, an officer, employee, staff member or agent if the individual does not request an open meeting. ORS 192.660(2)(b).
- (c) To consider matters pertaining to the function of the medical staff of a public hospital licensed pursuant to ORS 441.015 to 441.063, 441.085, 441.087 and 441.990(3). ORS 192.660(2)(c).
- (d) To conduct deliberations with persons you have designated to carry on labor negotiations. ORS 192.660(2)(d).
- (e) To conduct deliberations with persons you have designated to negotiate real property transactions. ORS 192.660(2)(e).
- (f) To consider information or records that are exempt from disclosure by law, including written advice from your attorney. ORS 192.660(2)(f).
- (g) To consider preliminary negotiations regarding trade or commerce in which you are in competition with other states or nations. ORS 192.660(2)(g).
- (g) To consult with your attorney regarding your legal rights and duties in regard to current litigation or litigation that is more likely than not to be filed. ORS 192.660(2)(h).
- (I) To review and evaluate the performance of an officer, employee or staff member if the person does not request an open meeting. This reason for executive session may *not* be used to do a general evaluation of an agency goal, objective or operation or any directive to personnel concerning those subjects. ORS 192.660(2)(i) and 192.660(8).

- (j) To carry on negotiations under ORS chapter 293 with private persons or businesses regarding proposed acquisition, exchange or liquidation of public investments. ORS 192.660(2)(j).
 - (k) For a health professional regulatory board to consider information obtained as part of an investigation of licensee or applicant conduct. ORS 192.660(2)(k).
 - (l) To conduct labor negotiations, if requested by negotiators for both sides. ORS 192.660(3).
- Announce that you are going into executive session pursuant to ORS 192.660 and cite the specific reason(s) and statute(s) that authorize the executive session for *each* subject to be discussed. See sample script on next page. (You may hold a public session even if an executive session is authorized.)
 - If you intend to come out of executive session to take final action, announce when the open session will begin again.
 - Specify if any individual other than the news media may remain.
 - Tell the media what may *not* be disclosed from the executive session. If you fail to do this, the media may report everything. If you discuss matters other than what you announce you are going to discuss in the executive session, the media may report those additional matters.

News media must be excluded from executive sessions held to discuss litigation with legal counsel if the media is a party to the litigation.

- Come back into open session to take final action. If you did not specify at the time you went into executive session when you would return to open session, and the executive session has been very short, you may open the door and announce that you are back in open session. If you unexpectedly come back into open session after previously announcing you would not be doing so, you must use reasonable measures to give actual notice to interested persons that you are back in open session. This may require postponing final action until another meeting.
- Keep minutes or a sound, video or digital recording of executive sessions.

NOTE: If a governing body violates any provision applicable to the executive session provisions in the Public Meetings Law, a complaint against individual members of the governing body can be filed with the Oregon Government Standards and Practices Commission (OGSPC). The OGSPC may impose a \$1,000 civil penalty, unless the governing body went into executive session on the advice of its attorney.

Sample Script to Announce Start of Executive Session

The [governing body] will now meet in executive session for the purpose of _____
[limited to enumerated purposes in ORS 192.660] _____. The executive session is held
pursuant to ORS 192.660(____) [choose appropriate section(s) for *this* session], which allows the
Commission to meet in executive session to _____ [list activity(ies)] _____.

Representatives of the news media and designated staff shall be allowed to attend the executive session.* All other members of the audience are asked to leave the room. Representatives of the news media are specifically directed not to report on any of the deliberations during the executive session, except to state the general subject of the session as previously announced. No decision may be made in executive session. At the end of the executive session, we will return to open session and welcome the audience back into the room.

* The governing body may choose to allow other specified persons to attend the executive session. *See Barker v. City of Portland, 67 Or App 23, 676 P2d 1391 (1984).*