



# Certified Advisor Series Module 4: Running Effective Meetings

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## A. Basic Meeting Agenda

1. Call to \_\_\_\_\_ – Start of the meeting
2. \_\_\_\_\_ – The number that must be present to hold a meeting  
(Usually it is a majority of the members)
3. Approval of the \_\_\_\_\_ – Record of the previous meeting  
*Template for meeting minutes <https://bit.ly/2XQZO68>*
4. \_\_\_\_\_ Reports – Officers report on their activities, concerns, needs, etc.
5. \_\_\_\_\_ Reports – Committees report on their activities, concerns, needs, etc.
6. \_\_\_\_\_ Business – Items left over from previous meetings
7. \_\_\_\_\_ Business – New items for consideration
8. \_\_\_\_\_ – Information for the benefit of the organization
9. \_\_\_\_\_ – End of the meeting

## B. Responsibilities of the Chair

1. \_\_\_\_\_ the meeting, effectively and fairly. The chair usually only votes if there is a \_\_\_\_\_.
2. Set and /or follow the published \_\_\_\_\_.
3. Call on \_\_\_\_\_ to participate, make motions, and speak. The Chair does not typically speak during \_\_\_\_\_ on a motion.
4. Restate \_\_\_\_\_ after they are made.
5. Rule on parliamentary \_\_\_\_\_, requires some knowledge of parli-pro.
6. \_\_\_\_\_ discussion and call for votes.

**C. Parliamentary Procedure | What Does It Teach Us?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. Appropriate \_\_\_\_\_
4. Solving \_\_\_\_\_ in a way other than \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_ skills
7. \_\_\_\_\_ resolution
8. \_\_\_\_\_
9. Taking \_\_\_\_\_ graciously

**D. Parliamentary Procedure | Basics**

*Robert's Rules of Order, Newly Revised* is typically defined as the resource for anything not covered in the governing documents.

Members can:

1. Present motions: “\_\_\_\_\_.”
2. Second motions: “\_\_\_\_\_.”
3. Debate motions: “\_\_\_\_\_”
4. Vote on motions: “\_\_\_\_\_”

**Motions are how things get done!**

**E. Parliamentary Procedure | Tips**

1. A motion should be made before \_\_\_\_\_ of a topic.
2. Only \_\_\_\_\_ motion can be considered at a time.
3. The person making the motion gets to \_\_\_\_\_ about it first, then open to \_\_\_\_\_.
4. Motions can be \_\_\_\_\_ if members want to make changes to it. Amendments are done the same way as motions. Once a motion is amended, you can only talk about that part of the motion.

5. Amendments to the motion must be \_\_\_\_\_ on before going back to the main motion. If the amendment is \_\_\_\_\_, then it becomes part of the main motion. If \_\_\_\_\_, then you go back to the original, main motion.
6. After all of the discussion, take a vote: usually a \_\_\_\_\_ vote passes the motion.
7. There are four common ways to move to a \_\_\_\_\_:
  - a. By \_\_\_\_\_ consent
  - b. By seeing no \_\_\_\_\_ discussion, the Chair calls for a vote
  - c. By reaching a \_\_\_\_\_ for debate.
  - d. By ending \_\_\_\_\_:  
“I move to \_\_\_\_\_” or \_\_\_\_\_  
the \_\_\_\_\_”: requires a second, there is no debate on the motion, and takes a 2/3 majority to approve