MAXIMIZING LOCAL UNION MEETINGS
FACILITATOR’S GUIDE

TRAINING OBJECTIVES:
As a result of this training, participants will be able to:
• Identify what makes meetings effective/ineffective.
• Make local union meetings more results-oriented, fun, and motivational so that people will want to come back.
• Prepare an agenda for a local union meeting that includes an innovative segment.
• List best practices for planning and running local union meetings.

TIME: 1.5 - 2 HOURS

TECHNIQUES: Paired & Large Group Discussions
Small Group Exercise

MATERIALS: Flipchart (x2)
Markers (2 markers per table)

WORKSHEETS: #1: Effective & Ineffective Meetings
#2: Planning Guide for a Successful Meeting

HANDOUTS: #1: Tips for Planning Successful Meetings
#2: Tips For Running Local Union Meetings
#3: Speaking Up At Union Meetings

OTHER MATERIALS: Matching Exercise: Robert’s Rules of Orders
Blank paper (2 per table for note takers)
ROOM SETUP:  
1) Round tops that seat 5-7 person per table or  
2) U-shape setup

ADVANCE SETUP:

PREPARE THE FOLLOWING FLIPCHARTS:  
• “What Makes a Meeting Great”  
• “What Makes a Meeting Lousy”  
• “Training Objectives”  
• “Small Group Exercises: Planning a Successful Meeting”  
• “Do’s for Running Meetings”  
• “Don’ts for Running Meetings”

FACILITATOR’S GUIDE:

1. As participants arrive, ask them to find a partner and have a one-on-one conversation using WORKSHEET #1: EFFECTIVE AND INEFFECTIVE MEETINGS. Continue to pair people up as they come in, letting them know that we’ll have a report back and discussion in about 5 minutes.

2. Welcome participants and introduce yourself.

3. Refer to the prepared flipcharts at the front of the room and ask each pair to say their first names, and give one GREAT, and one LOUSY. Record their responses on the appropriate flipcharts. (If there are repeats, use check marks on the repeated answers).

4. After each pair has reported, ask the group if they see any trends or themes on the flipcharts.
5. Explain that now that we’ve pinpointed what makes meetings great or lousy, we can take a step back and consider how we want to run meetings that we have responsibility for.

6. Review the workshop objectives, listed on the prepared flipchart.

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• Prepare an agenda for a local union meeting that includes an innovative segment.
• List best practices for planning and running local union meetings.

7. Tell the group that we want to start with a quick poll to find out a little more about who is in the room. Ask participants to raise their hand or stand up if they:
   a. Hold a local union office.
   b. Have ever chaired a local union or committee meetings.
   c. Are recording secretary or serve as the minutes-taker for meetings.
   e. Like and are familiar with Robert’s Rules.
   f. Find that Robert’s Rules hinder participation by members.

8. Place the “LOUSY” flipchart on one side of the room and the “GREAT” flip chart on the other.

9. Conduct a LINE-UP: ask participants to line up by moving to the end of the spectrum that describes what their local union meetings are like. If their meetings are more like the “LOUSY” list, go towards that end; if they are more like the “GREAT” list, go towards that end. If they are somewhere in-between, line up somewhere in the middle.
10. Once everyone is in line, ask a few people at each end and a few in the middle to talk about why they placed themselves there.

11. Close the LINE-UP by asking people to return to their seats. Explain that now we will be looking at techniques for planning and running great local union meetings.

12. Form small groups of 5-6 people. If possible, group people with others from their local. If there are some participants who are alone, ask them to join other locals’ groups.

13. Give each group a piece of flipchart paper and markers and give each person WORKSHEET #2: PLANNING GUIDE FOR A SUCCESSFUL MEETING. Explain that each group will plan a local union meeting using the worksheet.

14. Review the directions for the Small Group Exercise on the prepared flipchart.

**SMALL GROUP EXERCISE: PLANNING A SUCCESSFUL MEETING**

A. Choose a recorder and a spokesperson for your group.

B. Choose a local meeting that someone in the group will have in the near future.

C. Complete Worksheet #2 for the meeting you have chosen.

D. Prepare an exciting meeting agenda and write it on the flipchart. (Flipchart the agenda only, not the answers to the worksheet).

E. Be ready to report out at least one innovative, outside-the-box element of your meeting agenda.

(You have 25 minutes).
15. While the groups are working, check in with them to make sure they understand the directions and are on task. Remind them to refer to the “GREAT” and “LOUSY” flipcharts for ideas. Give appropriate time warnings.

16. After 25 minutes, ask each group to give a short report, focusing on their best, most innovative agenda idea. (Use no more than 10 minutes for all the reports).

17. Conclude this exercise by distributing and reviewing the HANDOUT #1: TIPS FOR PLANNING SUCCESSFUL MEETINGS.

18. Tell participants that we just worked on how to plan a successful meeting; now we will focus on what to do when we are actually running union meetings.

19. Refer to the prepared flipcharts. Ask participants what are some of the “DO’S” for running effective local union meetings. (Remind them of the “GREAT” and “LOUSY” lists they developed earlier). Record responses on the flipchart.

20. Next ask: What are some of the “DON'TS” for running good union meetings? Record on flipchart.

21. Distribute and review the HANDOUT#2: TIPS FOR RUNNING A LOCAL UNION MEETING.

22. Ask how many people use Robert’s Rules of Order at their local union meetings. Ask if they sometimes find them confusing.
23. Tell them that if Robert’s Rules sometimes confuse us, imagine how confused our members must sometimes feel. Remind them that if we follow Robert’s Rules too severely, we can stifle discussion and turn off our members.

24. Distribute and briefly review the **HANDOUT#3: SPEAKING UP AT UNION MEETINGS: SOME USEFUL PHRASES.**

25. Distribute **WORKSHEET #3: MATCHING EXERCISE - ROBERT’S RULES OF ORDER.** Remind participants that no one will be graded: this is just a “refresher” for many and a starting point for others.

26. Give participants 5-7 minutes to complete the exercise. Next, ask participants to shout out answers. Once the exercise is complete, tell participants to keep this exercise as a learning tool and reminder of the basic principles of Robert’s Rule of Order.

   (NOTE: Cheat Sheet for facilitators is at the end of this curriculum).

27. To wrap up, ask each table to have a short 5-minute discussion regarding what they feel were the most useful ideas that came up in the workshop. One person from each table should take notes so they can report back in a few minutes.

28. Rotate around the room, taking one useful idea from each table, recording each one on the **prepared flipchart.** Go back around to capture any ideas that were not listed in round one.

**WHAT WE LEARNED: MOST USEFUL IDEAS**
29. Encourage participants to use their meeting planning worksheet the next time they plan or run a meeting.

30. Close by thanking them for their participation and adjourn!

31. Distribute and ask participants to complete the **WORKSHOP EVALUATION FORM** before leaving.
WORKSHEET #1: EFFECTIVE AND INEFFECTIVE MEETINGS

FIND A PARTNER WHO YOU DO NOT ALREADY KNOW AND DISCUSS THE FOLLOWING QUESTIONS.

Think of a meeting you have attended as a participant that was really effective. What made it great?

Think of a meeting you have attended as a participant that was really ineffective. What made it lousy?

NOTE: Please be prepared to share your ideas with the group in about ten minutes.
WORKSHEET #2: PLANNING GUIDE FOR A SUCCESSFUL MEETING

Preparing the meeting agenda is critical to the success of your meeting. Develop an agenda for your next meeting by answering the questions below. Be sure to list specific details about your upcoming local union meeting. Be creative and try adding a new feature to your meeting’s agenda.

1. What are the goals of the meeting? [Examples of meeting goals: plan a six month contract campaign; identify work site leaders to participate in an internal organizing drive; evaluate contract language.]

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2. What are the post-meeting action(s) you want members to take? [For example: join a union committee; sign-up for a phone bank; circulate petitions.]

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3. What is your “turn-out” plan that will encourage members to attend? What are key points that should be included on the meeting notice?

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4. Draft an agenda for this meeting.

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5. What’s the “hot button issue” agenda item or unique agenda item that will most likely spark the members’ interest, and why?

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HANDOUT #1: TIPS FOR PLANNING SUCCESSFUL MEETINGS

1. Plan the meeting ahead of time. Set meeting goals and decide what results or actions you want members to take after the meeting.
2. Develop the agenda. Focus on issues that members care about.
3. Plan an activity or invite a guest speaker that will appeal to members’ interests.
4. Line up committee reports, officer reports, staff reports, etc. Decide who and how report details will be given. Consider handing out written reports to keep verbal reports to a minimum.
5. Decide where and when the meeting will be. Select a day of the week, time and location that is most convenient for the majority of members.
6. Be sure the meeting room is comfortable and accessible. Consider a room set-up that will encourage participation (u-shape or roundtable).
7. Distribute the meeting notice to all members well in advance. In addition to written notice — leaflets, newsletters, bulletin boards, etc., — be sure to contact members one-on-one if you want a high turn-out.
8. The meeting notice should include the time/date/location and a theme for the activity or guest speaker (for example, “Pizza and Politics”).
9. Be thoroughly prepared to conduct the meeting smoothly and efficiently so that it starts on time and ends on time.
10. Consider an opening activity to engage attendees before you begin the formal agenda (for example, paired conversations or a video clip).
HANDOUT #2: TIPS FOR RUNNING A LOCAL UNION MEETING

1. Start on time.
2. Have an agenda and stick to it.
3. Organize your handouts for members.
4. Call the meeting to order with a welcoming tone.
5. Recognize first timers and new members.
6. Give people time to read minutes before approving them.
7. Keep reports from officers and staff short or ask people to give written reports.
8. Move to Secretary and Treasurer Reports quickly and address financial issues as needed per the organization's constitutional requirements.
9. Address old business items, but focus the majority of a meeting on new business and action.
10. Encourage lively discussion and debate on action items.
11. Let a diverse number of people have a chance to speak. Don't let the same person(s) dominate discussion.
12. Look for opportunities for members to volunteer.
13. Assign tasks to a chairperson who will collect names and phone #'s of volunteers and ask about follow-up.
14. When necessary ask for a motion, second, debate, and then call for a vote.
15. Have the decisions recorded in the minutes.
16. Help the Secretary record decisions by asking for the motion to be reread for the benefit of the Secretary.
17. Allow time for members from the floor to bring issues to the membership.
18. Allow time for announcements. Be respectful of all members.
19. Adjourn the meeting and always thank the members for taking time out from their families to attend the General Membership meeting.
20. End on time.
HANDOUT #3: SPEAKING UP AT UNION MEETINGS - SOME USEFUL PHRASES

1. To make a motion you must be recognized by the Chair and have your motion written down.
   • “I move that.....”
   • Say what should be done, not what shouldn’t. For example:
     ▪ GOOD: “I move that the union keep mailing lists confidential.”
     ▪ CONFUSING: “I move that the union not give out our names.”
   • It’s also a good idea to find a “second” for your motion ahead of time.

2. Expressing support for a motion
   • “Second . . .”
   • “I support this motion because ...”
   • “I support this motion for a number of reasons....”
   • “I’d like to speak in favor of this motion because ...”

3. Expressing opposition to a motion
   • “I am opposed to this motion because ...”
   • “I am speaking against this motion because ....”
   • “I encourage members to vote against this motion because ...”
   • “I have a number of concerns about this motion...”

4. Asking questions about a motion
   • Raise your hand and say: “Point of Information Madam Chair!”
   • Once you are recognized by the Chair, ask your question.
MATCHING EXERCISE: ROBERT’S RULES OF ORDER

FILL IN THE BLANK (___) WITH THE LETTER OF THE APPROPRIATE ANSWER ACCORDING TO ROBERT’S RULES OF ORDER.

ROBERT’S RULES. . .

1. ___ Coordinator of a meeting
2. ___ List of items to be discussed at a meeting
3. ___ Minimum number of members required to be present for a meeting to conduct, usually set by the constitution.
4. ___ Chairperson starting the meeting
5. ___ Official record of meeting discussions and decisions
6. ___ Must occur before you can speak to a motion
7. ___ Putting a proposal before a meeting for discussion
8. ___ An indication that a proposal has at least enough support to be discussed by the group.
9. ___ The motion currently being discussed by the meeting.
10. ___ A change to a motion by adding, deleting, or substituting different words or ideas which does not change the overall intent of the original motion.
11. ___ Chairperson asks the meeting to cease a discussion come to a decision by taking a vote on an issue. A 2/3 vote is required.
12. ___ A question about the motion being discussed.
13. ___ To lay aside discussion on a motion until a future time or meeting.
14. ___ To end the meeting.

ANSWERS

A. Amendment
B. Move to adjourn
C. Move to table
D. Chairperson or Chair
E. Recognized by Chair
F. Minutes
G. Point of Information
H. Making a Motion
I. Agenda
J. Second a motion
K. Come to order
L. Call the question
M. Pending or On the floor
N. Quorum
# MATCHING EXERCISE: ROBERT’S RULES OF ORDER

Fill in the blank (___) with the letter of the appropriate answer according to Robert’s Rules of Order.

## ROBERT’S RULES...

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WORKSHOP EVALUATION FORM

WORKSHOP: __________________________
DATE: __________________________

1. WHAT WERE THE TWO MOST IMPORTANT THINGS YOU LEARNED IN THIS WORKSHOP?

2. WHAT DID YOU LIKE LEAST ABOUT THIS WORKSHOP?

3. AS A RESULT OF THE WORKSHOP, WHAT WILL BE YOU DIFFERENTLY IN YOUR UNION WORK?

4. PLEASE RATE THE COMPONENTS OF THIS WORKSHOP:
   Content/Exercises: Excellent Very Good Good Adequate Poor
   Presenters: Excellent Very Good Good Adequate Poor
   Handouts/Materials: Excellent Very Good Good Adequate Poor
   Overall: Excellent Very Good Good Adequate Poor

5. OVERALL IMPRESSIONS OR COMMENTS: