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bob@rchcae.com

## **Boardroom Courtesy**

Bob Harris, CAE and Rosalinda Randall

How can you avoid a boardroom meltdown --- when voices are raised, fingers pointed or directors leave mad?

The board meeting is a setting that brings together diverse volunteers for the purpose of governance. Discussions can be passionate and frustrating, and the environment unique to new directors.

Observe boardroom courtesy to enable a more effective governing process.

**RSVP** – The purpose of an RSVP is to ensure a quorum will be present to conduct business, to be certain sufficient seating and documents are available, and to prepare or provide an accurate count for food and beverage.

**Prepare** – Nothing is more frustrating to board and staff than to have a director arrive who reads the agenda or opens the packet for the first time at the board table. Preparation should start upon notice of the meeting and receipt of the agenda.

**Brevity** – Make points succinctly. Read the micro cues of directors to determine if the message has been understood or it included TMI – too much information. Remember that brief is better and appreciated in most instances.

**Digital Distractions** – Turn off cell phones and other communication tools, or set them on vibrate. Unless it is a personal emergency a director should not bolt from the room upon receiving a call. Remember board meetings are confidential – don't be texting information to outsiders.

**Devil's Advocate** – Some directors feel like they are responsible for playing the role of the "devil's advocate." They are not shy about announcing it. The underlying reasons for the approach should not be to make another director look bad, provoke, or prove them wrong.



**Respect Boundaries** – Directors are responsible for governance. Do not wander into the realm of management which is a staff responsibility. An organizational chart

depicts lines of communication and hierarchy. Relationships with staff should remain professional, collegial.

**Board Seating** – Before rushing for a seat, allow the officers and staff to select where they feel most effective in their roles. Respect seat assigned if they've been made. Generally any guests sit apart from the board table. Guests don't have the floor unless called upon by the president officer.

**Time Management** – Respect the time of others and allocate sufficient time to fulfill the responsibilities of board service. Don't be the person who walks in late and asks, "Can you just catch me up?"

**Guiding Principles** – Organizations develop values or guiding principles over time, often reflecting the vision of the founders. For example, diversity, a spirit of transparency, member-driven or a professional image.

**Listen** – There is merit to the saying, *we have two ears and one mouth to listen twice as much as speaking*. Avoid being the person who interrupts with, "I just have a question." It characterizes a director who has not prepared or hasn't been listening. To reduce interruptions jot down any points and reserve them for the appropriate discussion time.

**Property** – Protect the resources of the organization. When making a spending decision ask, "How will the members perceive this?" At the end of one's term the organization's property (stationery, credit card, loaned items) should be returned.

**Confidentiality** – Things will be read or said at meetings that should remain confidential within the board, for example contracts or grievances. The meeting is a place for open discussion so long as confidentiality is assured. There will be designated spokespersons to communicate important points after the meeting.

**Authority** – Directors must not assume they have more authority than comes with the position. Unless explicitly appointed, volunteers, committees or chapters don't have authority to speak for the board.

**Unity** – Support the decisions of the board; don't start a firestorm by telling or writing emails or letters against board actions. Be careful about rehashing the board meeting in the parking lot.

**Gender Neutral** – Respect is an important aspect of board meetings. Avoid singling out people or groups. Addressing everyone with respect ensures that no one is

discriminated against (unintentionally or intentionally) nor treated differently. Try to use gender neutral language in making motions and long-lasting policies.

**Attendance** – The bylaws expect directors to be in attendance at duly called meetings. Missing a meeting is seldom acceptable, and whether or not a director attends, they are still liable for the decisions of the board. The board as a team is “only as strong as its weakest link.”

**Posture** - Slouching, head resting on hand, leaning back while stretching out, standing up to engage in yoga poses are all distractions.

**Decorum** – Directors are “agents” of the organization; maintain the decorum that reflects well on the organization. (Directors who wear an organization nametag or logo shirt should remove it before celebrating a night on the town.) Be careful with the casual attitude and language heard at home or work but not appropriate at the board meeting. Things cannot be unsaid. If someone has crossed the line, an apology may be in order.

**Hoodwinked** – Nobody likes a director who tries to pull a fast one on the board. Be open and honest with ideas and the rationale for proposals.

**Process** – Respect established processes associated with the organization. There will be a need to adhere to rules of order, read and comply with governing documents and to honor protocols.

**Personal Stories** – Using board time to share a personal challenge or drama is not the purpose. Directors are there to advance the mission and goals, not discuss personal issues.

**Body Language** – Read the body language of the board, especially the officers. The board has an agenda to complete in an allotted time. One good at reading body language can tell when there is anxiety in the meeting, things are behind schedule or discomfort is apparent.

**Disagreement** – Anticipate misunderstandings to arise, fervent opinions and passions. Displaying anger, tears or storming off mad is inappropriate. If necessary, politely request a *moment* to gather oneself, displaying one’s maturity and respect for others and the processes. Some discussions may be more appropriate by a closed door executive session.

**Meals** – Some meetings will require working through a meal. Table etiquette should apply. Nobody wants to listen to or watch someone chew ice, gum, chomp, lick, or crinkle wrappers. Adding onions and some other items permeates throughout the room.

**Pitch-In** – Someone was responsible for setting up the meeting. By adjournment there may be beverage containers, notes and food wrappers on the table. Before departing, offer to help staff clean up and reposition the room for the next meeting.

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**Note:** Bob Harris, CAE, offers governance tips and templates at [www.nonprofitcenter.com](http://www.nonprofitcenter.com). Rosalinda Randall is an etiquette trainer and author of *Don't Burp in the Board Room*, with resources available at [www.rosalindarandall.com](http://www.rosalindarandall.com).