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Meeting Management Made Easy

By Carolyn Torma

Have you ever sat in an out-of-control meeting where planning commissioners were focusing on the wrong issues and the public was unruly? Meetings can be run effectively, decisions can be well documented and easy to follow, and even long agendas can be completed on time. This article presents some useful tips for sound meeting management as well as providing references for where to find more help in managing your meetings better.

While most planning commissioners will participate in formal planning commission meetings, planning agencies and commissioners are increasingly using a variety of meetings to accomplish planning goals.

The Importance of Meetings

The most compelling reasons for meeting are to:

1. inform everyone of potential actions,
2. develop an understanding of issues and consequences, and
3. reach agreement for taking the actions that will ultimately affect the community.

A single meeting cannot always satisfy all those purposes. This is especially true if the commission is considering a very large project or plan. The group interaction will need to occur in a series of different kinds of meetings. Here is a brief list of the kinds of meetings in which planning staff and often planning commissioners participate.

Types of Meetings

Michigan Association of Planning
219 South Main Street, Suite 300 Ann Arbor, Michigan 48104
Phone: 734.913.2000 Fax: 734.913.2061 web: planningmi.org

Sharing information and monitoring. This is often termed "telling and selling." An example is a neighborhood meeting in which a new program of neighborhood-level grants is first announced. A second example might be a meeting between planning staff and a developer to conduct an informal review of a project proposal.

Decision making and problem solving. These meetings are called "probing and exploring." Here, the end result of the meeting is not known, but the purpose is. The group has identified a problem and, through discussion, better defines the problem and begins to identify solutions. An example is the parks and recreation department meeting with youth-related agencies to discuss how to improve youth recreation programs.



Creative/idea-generating. In these meetings a designated group finds the solution. An example might be a meeting of middle school youth and staff that explores youth recreation needs and their solutions. Staff facilitates the meeting, and city council members and planning commissioners serve as sounding boards.

Social and ceremonial. No real business is conducted in these meetings, rather the purpose may be to end a project. Examples are meetings to bestow historic preservation awards, honor retiring planning commissioners, or celebrate the opening of a new park.

Legislative/administrative. These meetings are formal and result in decisions that are upheld by law. In some states, planning commissions may serve as quasi-judicial or administrative entities, with final decision-making authority, as in the approval of a final plat of a subdivision or a conditional use. More typically, the city council or other elected body is the legislative body and makes the legally binding decisions for the community. A city council meeting is a legislative meeting. In some communities, quasi-judicial or administrative decisions by planning commissions or boards of zoning appeals may be appealed to the legislative body.

Advisory. Most planning commission meetings are advisory. Although the decisions reached by the advisory group are not legally binding, the meetings are still conducted in a formal manner and follow proper rules of order. The advice developed through this meeting is presented formally to the legislative group. All decisions and recommendations are carefully documented. Sometimes a planning commission will meet with the city council to discuss joint expectations and to review commission recommendations over the past year.

Common Meeting Management Problems

Some meetings will combine the functions outlined above. In a planning process, it is also common for meetings to be done in stages as the planning progresses. Also,

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make certain you know when these meetings must be public and when they can be more informal and involve only certain parties. Sunshine or open meetings laws or requirements in a municipal charter affect meeting location, notice, and content.

The size of the group will affect how you interact and what you will enact. As a rule, the larger the group, the more formal and carefully planned a meeting must be. Large groups cannot accommodate open-ended discussion well. Undoubtedly, your planning commission already has administrative rules or bylaws for how it conducts its meetings. Make certain you know what they say. Review them carefully with your senior staff to ensure your meetings meet legal requirements. For more information on the legal requirements of conducting planning commission meetings, see "You Be the Judge," *The Commissioner*, Summer 1996.

Confusion may arise when planning commission meetings are used to solve problems. As much as possible for major issues, hold working meetings and well-facilitated public meetings prior to the commission meeting to allow for genuine problem solving to occur. Often the commission meeting itself is too late in the process to try and get substantial public input on major projects. For more routine hearings, public input at the planning commission meeting works fine.

Debra Stein, a San Francisco consultant who works with developers to guide their projects through the review and adoption process, has written a book on meeting management. From her perspective, a common problem with planning commission meetings that get out of control is the unrealistic expectations that everyone places on a single meeting. She believes it is unreasonable for the public and officials to think that the planning commission meeting is the place to resolve complex planning and development issues. Public involvement has to be addressed in a more comprehensive manner. Otherwise, the public may feel that its voice is being ignored.

Bill Lamont, AICP, a Denver planning consultant, adds that not all planning commission meetings are consensus-building meetings. There are times decisions will be made that do not please segments of the population. The decisions must be made in the best interest of the community as a whole. As long as the planning process has been thorough and fair, and it garners adequate community support, the planning decisions made by the commission have a good chance of holding over time. Planning commissioners must be prepared for the controversy and the occasional lack of consensus.

Preparation

One key to well run meetings is good preparation. Every meeting must:

Begin with the agenda. In planning commission meetings, staff and the commission chair create the agenda. The agenda must be available to the public and distributed to

the commissioners and key participants sufficiently in advance of the meeting. It should identify the location of the meeting, the date, and start and end times.

A useful addition to an agenda is the time at which each item on the agenda will begin and end. As much as possible, the chair should adhere to the time schedule. A common problem is not setting time limits for discussion, resulting in overly long discussions. When this happens, you lose the attention of your fellow commissioners and participants. Therefore, setting and keeping time limits is important. If you set limits on presentations and comments, make certain everyone knows the time limit rule. Publish the time limits and the meeting management rules so speakers can prepare their remarks.

Orient new members and public attendees. The public should be oriented at the beginning of the meeting by the chair. The chair should review the principal rules of conduct, the purpose of the meeting, and the manner in which it will be conducted. Orientation for commissioners should occur in a separate meeting. Part of any orientation should include discussions of:



- The roles of chair, commissioners, staff, public, and presenter.
- The basis on which decisions are made and what documents guide decisions, such as the local comprehensive plan, zoning and subdivision ordinances, and state enabling legislation.
- The decisions the planning commission is authorized to make.
- Rules of conduct for meetings.
- Ethics and rules of official conduct for commissioners.
- Provide the commission with staff-prepared background materials prior to the meeting. It is crucial that commissioners read this material before the meeting and be prepared to speak to it. Here is what staff should provide as background materials:
 - Agenda
 - Proposal and copies of site plans and where appropriate, elevations of projects.
 - A staff report that provides:
 1. A review of local ordinance requirements pertinent to the proposal.
 2. An analysis of site conditions.
 3. Relevant materials in the local comprehensive plan.
 4. Comments or suggestions from other local government departments.
 5. A recommendation.

Running the meeting

A meeting must be led. The chair must:

1. move the meeting along to a successful conclusion,

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2. make certain all items on the agenda are addressed, and
3. maintain order.

The chair convenes the meeting on time and, if possible, ends on time. This establishes the discipline for the meeting.

The chair also sets the tone of the meeting. This tone helps maintain order and respect for the process. The chair should:

- Be well briefed on all issues (he or she must do the homework).
- Project a sense of order, discipline, and dignity while remaining calm and impartial.
- Avoid taking sides on an issue while in the role of chair. The chair will typically vote last in a decision by the commission.
- Insist that everyone speak politely and in an orderly fashion; name calling, personal attacks, noisy outbreaks, and rude behavior must not be tolerated.
- Make certain that the meeting follows the legal requirements.
- Make certain that decisions are based on the information before the commission.
- Ensure that the reasons for the decisions are well documented and relate clearly to the comprehensive plan and relevant ordinances.
- Ensure that everyone has a reasonable opportunity to be heard without dominating the proceedings.
- Ensure the meeting is objective and fair to all parties.

The chair's role is not the only important role. Being a good follower as a commissioner is also critical. Most of the same rules apply: be well prepared, help maintain an orderly and fair meeting, substantiate opinions based on the planning documents and data.

The meeting is conducted by the commission and with public input. Staff members are active prior to the meeting, preparing materials for the commission; at the meeting, they are typically responsible for introducing the project and the staff report with recommendations. To do this, they may use slides or other visuals. Visual materials, including maps, plans, slides, and graphics, must be clear and intelligible. The planning director and commission chair should work together with other staff members to set a high standard for these presentations. Finally, presentations should be systematic and thorough, but not tedious in their detail. Copies of relevant information should be readily accessible to the public.

Developers or other presenters also have a role. Most often their projects are presented by staff, but they may be given an opportunity to comment or respond to questions. If the developer presents his or her own project, the same guidelines stated above apply.

The public is invited to listen and comment during planning commission meetings. The chair should make it clear when these comments are welcome and how they should be made. For example, the chair explains that speakers must use the microphone in order that their comments be recorded and heard throughout the room. Again, the chair sets time limits and enforces them.

If your commission does not have clear administrative rules for meetings, it is strongly suggested that you adopt some. Consult your local government attorney about questions of procedural due process and complying with statutes or local ordinance or charter requirements. Your meeting management policies can reach far beyond legal issues and address issues such as visual documentation, time limits, maintaining order, etc.

Recording the actions

Planning commission meetings must be recorded. The secretary shapes the information into a written record. Minutes must be made available to commissioners and the public in a timely fashion. Some communities use their web site as a way of keeping the public informed. Posting minutes in a public area is also a good idea.

The decisions that the commission makes must be clearly written and properly substantiated.

Debriefing the meeting

Michael Chandler encourages planning commissions to debrief after their meetings. He also recommends that each commissioner complete a short meeting evaluation. This serves as a check for the commission on how well they achieved their goals and what actions they need to take to improve their meetings.

Running meetings effectively takes practice and patience. This article gets you started.

This article was based on a workshop conducted by Carolyn Torma, APA Education Manager, and Michael Chandler, Professor & Extension Community Planning Specialist, Virginia Tech University, in April 1998.