



BUSINESS LAW SECTION
OF THE FLORIDA BAR

**INCLUSION, MENTORING &
FELLOWSHIP COMMITTEE
LEADERS' HANDBOOK**

Table of Contents

Table of Contents	2-3
Welcome and about the Inclusion, Mentoring & Fellowship Committee (“IMF”)	4
Strategic Plan	4
Guidelines for Committee Leaders – Getting Started	4
A. OFFICER RESPONSIBILITIES.....	5
i. Chair	5
ii. Vice-Chair	5
iii. Second Vice Chair	5
B. SUBCOMMITTEES.....	5
i. Communication & Marketing Committee.....	5
ii. Networking Committee.....	5
iii. CLE Committee	5
iv. Mentoring Committee	5
v. Diversity Equity and Inclusion Committee	5
C. MEETINGS.....	6
i. Attendance	6
ii. Committee Budget and Finances.....	6
iii. Conducting Your Meetings	6
D. FELLOWSHIP.....	7
i. Applications and Selection.....	8
ii. Contacting Applicants and Onboarding Selected Fellows.....	8
iii. Applications and Selection.....	8
iv. Participation of the Fellows in the Section.....	8
v. Fellow Reimbursement	8
vi. Exiting Fellowship	8
E. COMMITTEE COMMUNICATIONS & SOCIAL MEDIA	8
F. IMPORTANT DATES TO REMEMBER.....	9

APPENDICES

A. Section Bylaws 13-18

B. IMF Strategic Plan (original and revised) 13-18

C. Robert’s Rules Cheat Sheet..... 13-18

D. Action Agendas Make Better Meetings..... 19-22

E. Sample Agenda..... 23

F. Sample Meeting Minutes..... 24

G. Section Diversity Fellowship Program Description..... 25

H. Sample Selection Letter with Pledge to be Executed..... 25

I. Sample Encouragement Letter to Applicant not selected 26

J. Section Reimbursement Policy and Form..... 19-22

K. Procedures for Review and Management of Fellow Reimbursement Requests 19-22

L. Mentor-Mentee Handbook and Agreements 19-22

M. Section Diversity Equity and Inclusion CLE Policy..... 19-22

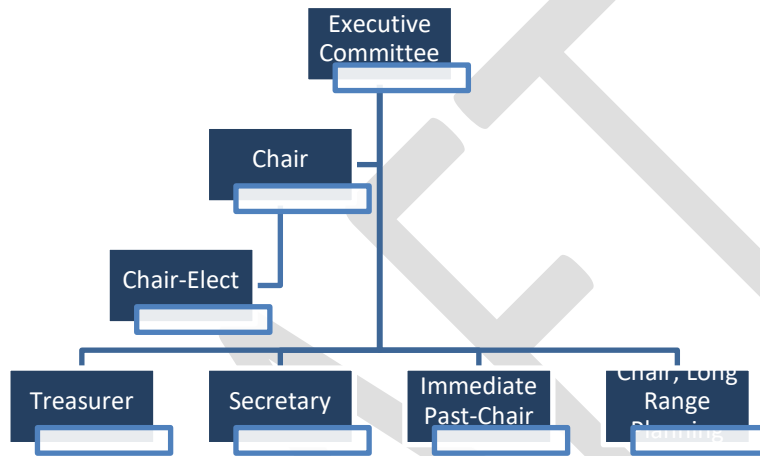
N. Master Fellow Contact List..... 19-22

DRAFT

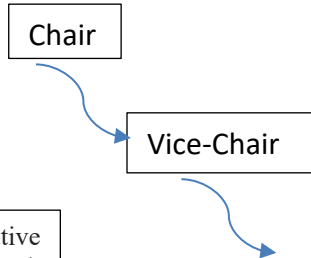
Welcome to Committee leadership in the Business Law Section of the Florida Bar.

You are encouraged to review this Handbook as it provides information that will guide you through your term as a leader of a Business Law Section (the “Section”) Committee which term of office begins immediately after the conclusion of the annual convention of The Florida Bar and ends at the conclusion of the next annual convention of The Florida Bar, at which time the chair is automatically succeeded as chair by the vice chair. The IMF vice-chair will likewise be succeeded as vice-chair by the second vice-chair.

See below for an illustration that depicts the hierarchy chart for the Section.



Each Substantive, Standing, and Task Force Committee will have a Chair and a Vice-Chair, and in some cases will also have a Second Vice-Chair, who assist the Chair and are usually next in line for the position directly above them.



The Executive Council leads the Business Law Section. The Executive Committee, Chairs of Substantive and Standing Committees, and Task Forces make up the Executive Council. The Executive Council makes decisions that affect the Section as a whole. This is set forth in the Amended and Restated Bylaws which are attached as an Appendix.

About the Inclusion, Mentoring & Fellowship Committee (“IMF”)

The Inclusion, Mentoring & Fellowship Committee (“IMF”) is the central committee of the Business Law Section (the “Section”) charged with advancing and facilitating cooperation, communication, and collaboration in support of the *IMF Strategic Plan* — to eliminate bias and enhance diversity and inclusion in the Section, legal profession, and

justice system. IMF consists of a diverse group of members of The Florida Bar, including judges, academics and private practitioners who are charged with the task of fostering an inclusive environment within the Section so that all members are motivated to contribute to the goals of the Section and succeed professionally.

For more information visit the IMF webpage: <https://flabizlaw.org/committees-task-forces/standing-committees/inclusion-mentoring-fellowships/>

A. OFFICER RESPONSIBILITIES

i. Chair

The role of the committee Chair is to guide the committee in its work consistent with IMF and the Section's Strategic Plan. The Chair must be sufficiently informed to interact knowledgeably with Section leadership, members, TFB staff, and the public. Duties include:

- 1.** Develop a committee work plan that will allow the committee to discharge its responsibilities effectively and efficiently for the year.
- 2.** Set Meeting Schedule.
- 3.** Set Meeting Agendas. Agendas should include all topics to be discussed at a meeting and should also include the date, location, starting time, scheduled breaks, and anticipated adjourning time. Any supporting or background material to further explain or detail the items on the agenda should also be included.
- 4.** Conduct Committee Meetings.
- 5.** Complete Committee Reports to Executive Council.
- 6.** Manage and guide the Subcommittees.
- 7.** Where appropriate, guide the committee in proposing programs, products and services that will further the goals and objectives of BLS.

ii. Vice-Chair

- 1.** Assist the Chair in organizing and carrying out the work of the committee including regularly communicating with members to ensure obligations are being fulfilled.
- 2.** Serving as Chair when Chair is not available to conduct official business.
- 3.** Keeping a record of attendance and preparing minutes of the committee meetings. Making draft minutes available as promptly as possible to the committee members for approval;
- 4.** Chair the CLE Diversity Policy/Diversity Equity and Inclusion Sub-Committee.
- 5.** Prompt Fellows for submissions of the reimbursement forms for the latest meeting with a deadline and provide in the prompt the most up-to-date Florida Bar form and policies (sample reimbursement form is attached).
- 6.** Review Fellow reimbursement submissions for compliance with Florida Bar policies and ensure necessary support invoices and receipts are attached. Forward compliant reimbursement requests to the Treasurer of the Section.
- 7.** Maintain Fellow Reimbursement Tracker to record each Fellow's use of the annual stipend and eligibility for any new reimbursements submitted. Update the Section Treasurer as needed or as requested.

iii. Second Vice Chair

Plan and coordinate with the Labor Day Retreat Committee on a CLE program that fits the mission of IMF and is aimed at Fellows, mentors, and friends of IMF.

B. SUBCOMMITTEES

Under the IMF umbrella, there are five IMF Sub-Committees which include the Communication & Marketing Committee; Networking Committee; CLE Committee; Mentoring Committee; and Diversity Equity and Inclusion Committee. The purpose and goals of each of these IMF Sub-Committees are listed on the IMF Committee webpage on the Business Law Section website. The IMF Sub-Committees have Chairs and Vice Chairs for continuity and to team up with friends of IMF, past Fellows, current Fellows, and new Fellows to work on projects together. These IMF Sub-Committees are to meet between Section meetings but no less than a couple of weeks before each Section meeting to discuss progress on projects, new business, and ideas for IMF. The Sub-Committee provides an emailed report to the Chair for inclusion in the Meeting Agenda as detailed above.

i. Communication & Marketing Committee

Responsible for monitoring and updating Business Law Section IMF web page and associated social media (current events, calendaring IMF-related events, related links); and providing emails to the Fellows with important reminders, forms, and helpful information.

ii. Networking Committee

Responsible for organizing social and networking events with and for BLS Fellows and Scholars, both virtual and in-person. Plan Sunday Dine Around dinner plans for the Fellows. Organize and schedule Fellow meal meet-ups and activities during the Section meetings. Research and reach out to voluntary bar organizations and other sections of the Florida Bar regarding regional events.

iii. CLE Committee

Responsible for developing CLE program and speaker database on diversity, inclusion, and gender bias. Work with CLE Committee on CLE topics that benefit and serve IMF goals and comply with the Diversity Equity and Inclusion CLE Policy.

iv. Mentoring Committee

Matching of mentees and mentors derived from BLS website. Monitor and supervise the experience of mentees and fellows. Plan mentoring/mentee event for the Retreat. Work with Membership Committee as needed to assist the Scholars Program.

v. Diversity Equity and Inclusion Committee

Responsible for periodic updates to the BLS Diversity Committee Strategic Plan updates. Monitor the BLS's CLE programming to ensure that BLS Entities conduct CLE programs in accordance with this policy. The DEI Subcommittee will have authority to engage and assist any BLS Entities found not to comply with the adopted Diversity Equity and Inclusion CLE Policy and inform the Executive Council of the same.

C. MEETINGS

i. Attendance

A committee member's seat is not a firm seat. Members may not send a substitute when they cannot attend meetings. This policy underscores that membership is an individual responsibility and preserves the integrity of committee proceedings. Attendance of members at committee meetings should be recorded and included with the minutes.

Your attendance and participation are important and your co-chairs will be relying on you to be present and participate at the three meetings held throughout the year, i.e. the Winter Meeting, Annual

Convention Meeting in June, and the Labor Day Retreat, as well as your Officer Responsibilities as outlined herein.

ii. IMF Finances

No committee shall incur any debt payable by The Florida Bar or the Section without prior approval from the Section Treasurer. IMF leadership shall submit to the Treasurer a detailed statement of funds needed or required for the ensuing fiscal year December each year in advance of the Section Budget being finalized.

iii. Conducting Your Meetings

1. Pursuant to [Bylaw 2-9.6](#), the conduct of all meetings of The Florida Bar, its Board of Governors, sections, divisions, and committees, is governed by the [Robert's Rules of Order](#). See *Appendix A for Robert's Rules Cheat Sheet*.
2. The following sequence, or order of business, is generally accepted:
 - a. Call the meeting to order at designated time and place.
 - b. Roll Call
 - c. Review the minutes of the previous meeting
 - d. Discuss and resolve agenda items
 - e. New Business
 - f. Adjourn the meeting on time.
3. As stated above, the Chair is responsible for setting the meeting agenda and ensuring it is sent to all members of the committee prior to the meeting.
4. As stated above, the Vice Chair or a delegate thereof, is responsible for keeping record of attendance and preparing minutes of the committee meetings.

D. FELLOWSHIP

As a part of the Section's commitment to recruiting young lawyers and diverse lawyers to join, participate (and ultimately serve in leadership positions) in the Section. The Section has implemented a Fellowship Program to provide a two-year subsidy to eight qualified applicants who express an interest in becoming active in the substantive work and leadership of the Section. During their participation in the Fellowship Program, selected Fellows will receive leadership training and work closely with leading attorneys in the Business Law field. At the end of their Fellowship term, we are confident all Fellows will find the program enhanced their personal and professional development.

i. Applications And Selection.

1. Applicant Qualifications: The Fellowship Program is open to all members of the Florida Bar in good standing who satisfy the following criteria: (A.) Be a current member of the Business Law Section; and (B.) Be (a) practicing in the Florida Bar for fewer than 10 years or (b) younger than 36 years of age; and (C.) Applicants must demonstrate that a substantial portion of their practice is focused in the area of Business law.
2. January of each year the Fellowship Application should be reviewed for desired edits and changes with goal of the Fellowship Application, which is as of this Handbook is submitted online on the Fellows webpage (<https://flabizlaw.org/about-us/fellows/>) on the Section website, to be active effective and accepting application as of the Winter Meeting. The application period is usually open until March 31st.

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3. After the closing of the application period, co-chairs will meet to review the applications and discuss the applicants that best fit the qualifications of a Fellow and that are most likely to succeed in the Section and fulfill participation requirements.

ii. Contacting Applicants And Onboarding Selected Fellows

The Fellowship Application period begins in January and closes in March. The FLB staff should notify the Chair, Vice Chair, and Second Vice Chair of incoming Fellowship Applications and provide them to the Chair, Vice Chair, and Second Vice Chair on an ongoing basis for review until the Fellowship Application period closes. Within 5 days of the Fellowship Application period closing, the Chair or Second Vice Chair will email leadership and past-chairs of IMF to form a committee to select the Fellows from the Fellowship Application pool. By mid to end of March, the committee formed to select the Fellows will meet and confer to choose the Fellows for the new Fellow Class. The Chair will approve of the Fellows selected. In early April, the Chair will send a list of the selected Fellows in the new Fellow Class to Leadership for final review and approval. Once Leadership provides final approval, the Chair will email each new Fellow the approval letter, along with the pledge, information about the Annual Meeting, as well as a request for headshot, biography, and subcommittee selection. The Vice Chair will email the encouragement letter to the applicants who were not selected. The Chair and Vice Chair will collect the information requested from the new Fellows and send reminders in late April/early May to those new Fellows who have not confirmed acceptance.

iii. Fellowship Reimbursements

The Vice Chair will email the Fellows no later than 15 days from the date of the event to remind the Fellows to submit their Reimbursement Requests. As the Reimbursement Requests come in, the Vice Chair will confirm receipt with the Fellow and review each Reimbursement Request for compliance with the BLS and TFB's reimbursement policies. Once the Vice Chair approves the Reimbursement Request, the Vice Chair will email the Reimbursement Request to the BLS Treasurer for final review and approval. The BLS Treasurer will then submit the Reimbursement Request to TFB staff who will thereafter mail a Reimbursement check to the Fellow. If the Vice Chair rejects the Reimbursement Request, the Vice Chair will email the Fellow and instruct the Fellow to revise the Reimbursement Request to comply with the BLS and TFB's reimbursement policies and thereafter resubmit a revised Reimbursement Request. Once the Vice Chair receives the revised Reimbursement Request, the Vice Chair will again review it for compliance and upon approval, email the revised Reimbursement Request to the BLS Treasurer.

iv. Exiting Fellowship

1. IMF Co-Chairs should encourage continued involvement of Fellows exiting their Fellowship term in the Section.
2. At the Winter Meeting, IMF Co-Chairs should reach out to Fellows who are approaching the end of their respective terms as a Fellow and inquire if there is a Committee or Task Force that they would be interested in leading. If a recommendation is suitable, a recommendation should be submitted to the Section Chair for consideration.
3. The Fellow Retention Task Force, or a member from the IMF Diversity Equity and Inclusion Subcommittee should conduct an exit interview to assess the Fellow's experience and obtain feedback on the program and Section overall.

v. Participation of The Fellows in The Section

In order for a Fellow to stay on as a Fellow and receive the benefits of the Section Fellows Program, a Fellow must fulfill the following minimum requirements:

1. Maintain status, as a member in good standing of The Florida Bar's Business Law Section.
2. Attend at least one (1) substantive committee meeting and one (1) standing committee or task force committee meeting during each BLS Section meeting, for at least two (2) of the three (3) BLS Section meetings held during the first calendar year of your Fellowship.
3. Make a reasonable effort to participate in at least one (1) substantive project (subject to approval by the current IMF Chair or Vice-Chair) during the first calendar year of your Fellowship, and shall be solely responsible for notifying the current IMF Chair or Vice-Chair before the end of the first calendar year of your Fellowship if you have been unable to participate in a substantive project for reasons beyond your control and may be required, upon request, to demonstrate your efforts to participate in a substantive project.

E. COMMITTEE COMMUNICATIONS & SOCIAL MEDIA

Emails and social media posts with dates, reminders, and helpful tips are disseminated by the Communications Sub-Committee, with co-chairs providing information and prompts as necessary to ensure Fellows are getting all the information needed for attending meetings and successfully participating in the Section.

Links to the IMF listservs and social media are posted on the IMF webpage:

- [IMF Listserv](#)
- [Fellows Listserv](#)
- [Fellows Facebook Group](#)
- [Fellows LinkedIn Group](#)

All external committee communications must be submitted to The Bar's Communications staff for review and approval. This includes publications in The Florida Bar News, Journal, or website(s). Social media accounts must be approved by Communications staff. Contact your Committee Staff Liaison so they may coordinate such activities with Communications staff.

F. IMPORTANT EVENTS TO CALENDAR

i. January

1. Review and approve Fellowship Application.
2. Open Fellowship Application period.
3. *Winter Meeting* (Agenda prepared 2 weeks in advance)

ii. February

1. Follow up with Fellows on Winter Meeting reimbursements.
2. Encourage Section members to get Fellowship applications.

iii. March

1. Close Fellowship Application period.
2. Email leadership and past-chairs of IMF to form committee to select Fellows.
3. Follow up with subcommittees for reports to include in agenda.
4. Reach out to TFB staff for comp code for Fellow registration for the Judicial Liaison Dinner.
5. Send out information for the Winter Meeting to Fellows. Encourage booking hotel ASAP.

iv. April

1. Select new Fellow Class and send to Section Leadership for approval.
2. Send Selection Letters to applicants selected with pledge, information for the Annual Meeting, and request for headshot, biography, and subcommittee selection.
3. Send encouragement letters to reapply to those not selected after all selected Fellows confirm acceptance.
4. Follow up and gather pledges, photos, biographies, and subcommittee selections from new Fellow class.
5. Prompt announcement of new Fellows via newsletter and include the announcement on IMF webpage.

v. May

1. Get subcommittee reports for inclusion in the agenda.

vi. June

1. **Annual Meeting** (Agenda prepared 2 weeks in advance)
2. Start planning the Labor Day Retreat CLE
3. Update IMF website with new co-chairs and review website for other updates.
4. Reach out to TFB staff for comp code for Fellow registration for the Labor Day Retreat.
5. Send information for the Labor Day Retreat and encourage booking and registration ASAP.

vii. July

1. Follow up with Fellows on Annual Meeting reimbursements.
- 2.

viii. August

1. Get subcommittee reports for inclusion in the agenda.

ix. September

1. **Labor Day Retreat** (Agenda prepared 2 weeks in advance)

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2. Follow up with Fellows on Winter Meeting reimbursements and feedback from the Labor Day Retreat.

x. October

xi. November

xii. December

1. IMF Leadership to submit to Section Treasurer a detailed statement of funds needed to include in the Budget.
2. Reach out to TFB staff for comp code for Fellow registration for the Judicial Liaison Dinner.
3. Send out information for the Winter Meeting to Fellows. Encourage booking hotel ASAP.
4. Get subcommittee reports for inclusion in the agenda.

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APPENDICES

A. Section Bylaws	13-18
B. IMF Strategic Plan	13-18
C. Robert’s Rules Cheat Sheet.....	13-18
D. Action Agendas Make Better Meetings.....	19-22
E. Sample Agenda.....	23
F. Sample Meeting Minutes.....	24
G. Section Diversity Fellowship Program Description.....	25
H. Sample Selection Letter with Pledge to be Executed.....	25
I. Sample Encouragement Letter to Applicant not selected	26
J. Section Reimbursement Policy and Form.....	19-22
K. Procedures for Review and Management of Fellow Reimbursement Requests	19-22
L. Mentor-Mentee Handbook and Agreements	19-22
M. Section Diversity Equity and Inclusion CLE Policy	19-22
N. Master Fellow Contact List	19

APPENDIX A: SECTION BYLAWS
APPENDIX B: IMF STRATEGIC PLAN
APPENDIX C: ROBERT'S RULES CHEAT SHEET

SEE BELOW

APPENDIX E: SAMPLE AGENDA
APPENDIX F: SAMPLE MEETING MINUTES
APPENDIX G: Section Diversity Fellowship Program Description
APPENDIX H: SAMPLE SELECTION LETTER
APPENDIX I: SAMPLE ENCOURAGEMENT LETTER
APPENDIX J: SECTION REIMBURSEMENT POLICY AND FORM
APPENDIX K: PROCEDURES FOR PROCEDURES FOR REVIEW AND MANAGEMENT OF FELLOW REIMBURSEMENT REQUESTS
APPENDIX L: MENTOR-MENTEE HANDBOOK AND AGREEMENTS
APPENDIX M: SECTION DIVERSITY EQUITY AND INCLUSION CLE POLICY
APPENDIX N: MASTER FELLOW CONTACT LIST

APPENDIX D

ACTION AGENDAS MAKE BETTER MEETINGS

Savvy planning of your next meeting's agenda can make a surprising difference in the success of the program.

An agenda defines the purpose of a meeting. More than just a list of topics, it tells attendees how and when they will make decisions. A good agenda is an action-oriented blueprint for the meeting, and it should be linked to the clock. Time limits and expected actions should be specified for each item in the agenda.

Too often, the agenda is scribbled on the back of an envelope a few minutes before a meeting, or even during the meeting. Prepare your agenda well in advance of the meeting so you can distribute it to everyone who will attend. With all the members properly prepared, you can get a lot of work done in a two-hour meeting.

Meetings rarely should last more than two hours. The time can be extended to three hours, if necessary, but meetings that last longer than three hours become counterproductive. Don't believe it when people say they are willing to "meet all night if necessary." After about three hours, they will reach for any excuse to adjourn.

The old, typical agenda format begins with a reading of the minutes of the previous meeting, followed by reports, old business, new business, then miscellaneous business. This kind of agenda is no good. You can read the minutes if that is appropriate for your meeting but frame the rest of the meeting according to the complexity of items and the clock.

Consider simple items in the early part of the meeting, then move to more difficult items just past the middle of the meeting. Return to simple items toward the end of the meeting. With this kind of structure, you should be able to cover about seven items in a two-hour meeting. The following are some basic, time-related rules for framing the meeting:

Read brief, agenda-relevant minutes (10 minutes)

In a typical committee meeting, there is a reading of the minutes of the last meeting, changes in the minutes if necessary, and adoption of them.

"Agenda-relevant" minutes means the headings of the last agenda are repeated in the minutes. This way, anyone can compare the meeting's agenda and minutes to get a quicker understanding of actions taken.

The minutes should summarize the meeting and all decisions made. Refrain from a verbatim recording of what was said and emphasize instead what was decided. This will avoid bogging down the meeting with a rehash of the last meeting.

Summarizing any points of view expressed without naming members' names will further reduce controversy over the minutes. Accuracy is all that should concern the members.

If you do all of this and the members still want to go over the same ground again, focus on language to avoid fresh discussion. For instance, ask "What language do you feel would be more appropriate?"

Here are four rules for dealing with agenda-relevant minutes:

1. Record members' views without naming them.
2. Summarize debates and avoid verbatim reports.
3. Keep it crisp and brief; record the actions taken.
4. Write the minutes using headings from the previous meeting's agendas.

Reports (time varies)

The number of reports should be kept to a minimum because they are great time-wasters. If you list a report, you can be sure that the reporting person will have something to say and often will ramble on interminably once given the floor. So, list on the agenda only those reports that are absolutely necessary.

As early as possible, find out if the subcommittee has something to report. If they do not, leave it out of the agenda. When you list a report in the agenda, clearly state the action that the members will be invited to take. This will encourage them to read the report outside the meeting, which is where reports belong. Many members never bother to read reports because they expect to be subjected to a reading of them at the meeting.

If a report is to be included in the agenda, circulate executive summaries of it to all members well in advance of the meeting. Such summaries should be no longer than about 10% of the original, preferably no longer than one or two pages. Good executive summaries will encourage members to read the reports beforehand, which is more efficient than their listening to them. Reading a paragraph is better than listening to a paragraph.

Here are four rules for handling reports:

1. List only relevant reports in the agenda.
2. Specify the expected activity relative to the report.
3. Summarize reports requiring no action.
4. Distribute executive summaries of scheduled reports before the meeting.

Announcements (15 minutes)

This is a flexible category that allows you to fill time if people are late for the meeting. It is essential that you start meetings on time; this shows respect for those who are there at the scheduled time.

Announcements should be noncontroversial and declarative in nature, made simply to transmit information. They should provoke little or no discussion. If an announcement does stimulate a good deal of discussion, table it and schedule it for the next meeting's agenda.

Less controversial items (15 minutes)

Light, relatively easy items should come early in the agenda. Easily reaching their first decision makes members optimistic and confident to tackle more difficult items. A quick, easy decision puts everyone in a decision-making frame of mind.

If the agenda is written in a way that specifies exactly what actions are required, members will be more prepared to deal with each item effectively. Examples are approval of minutes, appointment of the new membership director, and whether to purchase machine X or Y.

Most difficult time (25 to 40 minutes)

The middle section of a meeting is typically the time of the peak attendance. And, in a two- or three-hour meeting, members have the most psychological energy in the middle. So, this is the best time to deal with the most difficult item.

The agenda should allow 30 to 40 minutes for dealing with the most difficult item. If more time is required, the members probably need more information. Table the item. Make the arrangements to get more information and bring the item back in a later meeting.

Break (3 to 4 minutes)

Take a brief stretch break about two thirds of the way through the meeting. The mind can only absorb what the seat can bear, and the members will have been sitting for more than an hour. Besides, they need a mental break after dealing with the most difficult item.

The break itself needs to last only a few minutes, but the mental break will continue with the discussionable items.

Discussion-only items (15 to 30 minutes)

Putting discussion-only items after the most difficult item helps reduce tensions that might have built up. Discussing an item without having to reach a decision allows for ventilation of feelings. It also allows members to assess the political orientations of other members and their feelings about the issue. This sets the stage for compromises that members can make between meetings. And they will be prepared to get down to business when the item comes up at the next meeting.

Members know in advance that no decision is required on discussion-only items. This is an advantage because it provides adequate discussion of an issue, which helps avoid premature decisions.

Taking a straw vote can also help avoid wasted research by giving preliminary indications of which alternatives are preferred.

The "in-principle" technique should be used to help keep the discussion from getting out of hand. This is an agreement to stick to the major elements of an issue and leave the lesser how-to aspects for later. Without an in-principle agreement, members tend to oscillate between discussing major elements and minor details. It is better to have a thorough discussion of the major elements and leave the minor details for the next meeting.

Least difficult item (10 minutes)

Put your least difficult item -- a quickie that can be dispatched with ease -- in the final minutes of your meeting. This allows you to end the meeting on a positive note of agreement. That way, people can leave with a sense of orderliness and accomplishment.

The feelings that people have on leaving a meeting are important. The end of one meeting is the beginning of the next one, so good feelings at the end make the beginning of the next one more positive.