



Twenty-One Tips for Taking Meeting Minutes

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Thank you for downloading *Twenty-One Tips for Taking Meeting Minutes*.

We've published this document to provide some help for the people who need help with minute taking and are not part of a group that would benefit from our onsite minute-taking training program.

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Twenty-One Tips for Taking Meeting Minutes

While most of us have had the opportunity to take notes for our own use, taking the minutes of a meeting requires an altogether different set of skills. For example, in personal notes it is perfectly fine to use abbreviations, symbols, shorthand—even drawings. Your own notes don't have to be neat (although it helps), follow a set format, have all the words spelled correctly, or show any consideration for an outside reader. They're for your use only.

By contrast, meeting minutes serve a completely different purpose because they are written for others, and they function as historical documents that mark decisions and actions taken by a group. The recorder of a meeting's minutes has a huge responsibility and must be willing to take the job seriously and carefully.

Should you find yourself being asked to function as a minute recorder, the following tips will help you take them with accuracy and ease.

1. Lay the Groundwork

Distribute minutes from the previous meeting before the one you are getting ready to attend. This will give you and everyone else a chance to recall what was decided, who needed to complete certain things, and what still needs to be done.

2. Know the Purpose

To understand the importance of the task, remember that minutes serve several purposes:

- ✔ They are an historical record of a group's decisions and actions
- ✔ They are a reminder of who was given assignments
- ✔ They are evidence of deadlines
- ✔ They are a benefit for people who are absent when decisions are made.

3. Get the Agenda

Before the meeting, get the agenda from the person conducting the meeting, and make an outline. Doing so will save time, but take accurate note of the order in which the major items are discussed.

4. Choose Your Method

Figure out beforehand which recording method would be most comfortable for you:

- > notebook
- > template and clipboard
- > laptop
- > tape recorder
- > shorthand

5. All Systems Go

Whichever method you decide to use, make sure you have everything you will need. If it is electronic, make sure it works. Just in case your chosen method stops working, have a backup method in your back pocket.

6. Leave Space in Which to Work

However you decide to take minutes, provide ample room on paper for taking notes.

7. Here, Here

If possible, have the names of all participants before the meeting begins. If this isn't feasible, pass around an attendance sheet once people arrive. Take note of who is present, who is missing, who arrives late, and who leaves early. Make sure all names are spelled correctly.

8. Have a Seating Chart

For in-person meetings that occur around conference tables, it's a good idea to create a seating chart, especially if not all the participants are known to you. Since you will have to accurately record who makes motions, it will save time if you know from the chart who is doing the speaking at any given time.

9. Know Everyone's Position

In addition to knowing people's names, you should also know before the meeting begins who serves on or heads any committees. Like knowing people's name ahead of time, knowing their positions will save time when finalizing the minutes.

10. Create a Minutes Template

Since minutes must contain consistent information regardless of what gets discussed, it saves a huge amount of time to have a template or prepared fill-in-the-blank form to use so that your time isn't wasted writing down standard information. In fact, much of the information can be filled in before the meeting actually begins. As you prepare the template, make sure you have the following information:

- ✔ Type of meeting (daily, weekly, monthly, etc.)
- ✔ Purpose of meeting
- ✔ Date, time, and location of meeting
- ✔ Name of person who called the meeting to order
- ✔ Name of chairman or facilitator if different from the person above
- ✔ Names of those in attendance
- ✔ Indication that a quorum was or was not present
- ✔ Approval of previous meeting's minutes
- ✔ All motions that are made and names of those who made them
- ✔ Summary of any reports that are made
- ✔ Resolutions that are voted on
- ✔ Information regarding the next meeting (date, time, location)
- ✔ Adjournment time
- ✔ Name of the person who took the minutes and the date they were taken
- ✔ Name of the person who approved the minutes and the date of approval

11. Listen with Care

Once the meeting begins, the person taking the minutes has the difficult task of doing several things simultaneously. The hardest of these is sorting through a lot of verbiage to understand what is actually being said. The recorder must learn to focus on major issues, actions, and decisions and *not* on irrelevant comments that might be interesting but have nothing to do with what is under discussion by the group.

12. Just the Facts

To improve listening skills in order to record appropriate information, practice differentiating between statements that are facts and those that are opinions. The recorder's objective is to stick to the facts. These are pieces of information that are beyond dispute and objective in nature. By contrast, opinions are personal views that are subjective and easily disputed by others.

13. Keep it Clear and Simple

Regardless of how you write down what transpires during a meeting, you will need to make your final wording in the minutes absolutely clear for the benefit of others. Toward that end, provide language that is understandable, concise, and objective throughout.

14. Be Exact

The recorder must be absolutely accurate in presenting the facts of a meeting since once approved minutes become official documents of an organization. In some cases they are used as written evidence in court cases, so the recorder has a tremendous responsibility to be accurate and objective.

15. Noting Motions

Throughout meetings, it is likely that participants will make motions. The recorder must write down not only what the motion is but also who made it. It is not necessary to write down the name of the person who seconds a motion. Motions made by a committee do not require a second since the committee itself is made up of two or more people already.

16. What's on Hold

In addition to the motions that are made, seconded, discussed, and voted on, there will be occasions when subsidiary motions are made to postpone taking a vote. When voting on a motion is postponed, the recorder needs to indicate this has happened and offer whatever information is available about when a vote might be taken on the motion.

17. Adding Your Voice

In a best-case scenario, the person taking the minutes would not be a voting member among meeting participants. This doesn't always happen, so if you are asked to take minutes and you have full participation status, you would do well to write out questions you want to raise before the meeting begins. You will already have your hands full just writing down what others are saying, and by writing out any questions you might have beforehand, this will be one less thing you will have to think about as you record the other things that are said and done during the meeting.

18. Summarize

During the meeting, you will be writing at warp speed, and unless you have exceptional skills for listening and synthesizing information very quickly, you will probably write down a lot of information that can and should be condensed or eliminated altogether. No one will be looking at your personal notes at this point, but you must be able to make sense out of them yourself in order to prepare them for distribution. Focus on the major points that were made during each discussion and the decisions that the group reached about these points.

19. Don't Delay

The sooner you can finalize and type up the minutes the better. As more time passes, you may forget important items that you heard but didn't write down. The more time that passes, the less accurate the minutes will become, even if you have used a tape recorder.

20. Proofread with Care

You have been entrusted with a heavy responsibility, and while accuracy of information is your primary goal, you also have the obligation of making that information understandable to others. It won't be if you don't proofread every word you have typed. You will also blow your credibility as a reliable information provider if you produce minutes that are filled with misspelled words, incomplete sentences, abbreviations, and inaccurate punctuation. Take pride in your work, and keep in mind the expression: "What's worth doing is worth doing well."

21. Not So Fast!

If part of your job as the minutes recorder includes distributing the minutes to everyone, you should have them approved by the meeting's chair or facilitator before they are available to those who need to have them. They should be as close to perfect as you can get them before anyone sees them.

For more information about minute-taking training for your group, please contact us at info@businessstrainingworks.com or 301-934-3250.



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