Best Practices Guide:
Taking Meeting Notes & Creating Meeting Records
January 28, 2019

Definitions:

Meeting notes *are the detailed raw notes taken during a meeting.*

A ***meeting record*** *is a formatted document, which presents decisions, actions and discussion in an organized and concise manner, and which serves as the historical record of a meeting. Meeting records are usually reviewed and approved by a group.*

Why do we create meeting records? Why is this an important job? What skills are required to succeed?

Formalized meeting records which are officially approved by a group's membership provide a historical record of group discussions and decisions. Months after a decision is made or a plan adopted, group members may find it difficult to remember the reasoning behind it, and can refresh their memories by referring to the meeting record. Meeting records can help groups to keep track of their progress, contribute to year-end review and reporting processes, prevent miscommunications, keep members accountable for tasks they've agreed to complete, provide momentum and connectivity between meetings, and simplify agenda-setting for future meetings. Successfully taking good meeting notes and then formalizing them as meeting records requires that note-takers be well-prepared and organized before a meeting, attentive and responsive during a meeting, and prompt and diligent about preparing the formal record shortly after a meeting.

Step 1 - Taking Meeting Notes:

- Familiarize yourself with the meeting agenda beforehand and have a conversation with the facilitator to develop a game plan for successfully recording the content of the meeting. Discuss whether the facilitator will cue the note-taker regarding action items and/or topic changes, and if there is anything else the facilitator and note-taker will need to communicate about during the meeting. Reviewing records from previous meetings of the group can also help you prepare for discussions of unfamiliar subjects and give you a better understand the group's expectations for the final record, and review the format.

- Use the meeting agenda as a guide to set up your note-taking file in advance by inserting each agenda item into your meeting record template.
- You can take notes either using a laptop computer or with pen and paper. Each have their advantages and disadvantages. When typing, it is tempting to write down everything that is said. While it is likely that you will gather more detailed information, this can make pulling out the key summary items for the meeting record more time-consuming. Often people "translate" information when writing by hand, which can lead to more concise summary statements. Whatever system you use, it is always helpful to keep the end product in mind.
- Ask meeting attendees to add their names and affiliations to a paper sign-in sheet that you can later review when working on the attendance portion of the meeting record. This takes the pressure off of you to capture names, spellings, and affiliations during introductions. In addition, if you don't know the people in the meeting, having a written list in the order of how people are seated can help you know who is speaking.
- Stay focused on the discussion and capture everything you can in your notes, even comments that may not at first seem significant. A momentary lapse in attention can cause you to miss important shifts in the conversation.
- If you are unfamiliar with or confused by any subjects that come up during discussion and cannot ask for clarification during the meeting, try to record as much as you can in as close to participants' own words as possible, and make a note for yourself to ask for clarification from the meeting facilitator as soon as possible after the meeting.
- Record decisions, action items, and bin (saved for later) items in a separate section of your notes while also working on your main, comprehensive record. It may be difficult to pull out action items from general discussion after the fact if they are not clearly identified as such.

Step 2 – Creating a Meeting Record:

- As soon as possible after the meeting (ideally within 48 hours), set aside a few hours to transform your raw meeting notes into a formatted, digestible draft meeting record. Working on this soon after the meeting will help you to remember and summarize conversations more accurately.
- Follow the established formatting rules for the group's meeting record. (A suggested template appears at the end of this document.)
- Regardless of preferred formatting style, meeting records should include at the minimum: the date of the meeting, a list of attendees, a list of decisions, action items, and bin items, and a synopsis of the overall discussion including the main points covered for each topic.

- In summarizing the discussion of a given topic, try to include the full range of perspectives and ideas presented without repetition. Avoid the impulse to reflect all the various twists and turns a conversation takes, and trim out unproductive back-and-forth exchanges. One way to do this is with bullets that summarize main points.
- Unless otherwise directed, do not attribute specific statements or views to specific individuals. An impersonal record is less likely to be controversial and thus better able to serve its primary purpose (preserving and communicating meeting information).
- Re-read each statement in the meeting record to make sure that someone who was not present at the meeting can understand what it means, and adjust as needed.

[Name of Group]
Meeting Record
[meeting location and address]
[date and time of meeting]

ATTENDANCE

Members: [List only group members here. List alphabetically by last name and include both titles of elected officials and stakeholder group affiliations (not organizational affiliations) for all members—see following examples.] Jane Bell, forest products representative; Commissioner George Smith, Omega County; Margaret Williams, at-large representative.
Forest Service: [Include USFS personnel.]
Guests and Observers: [Non-member attendees not present to advise or facilitate, format as above and include organizational affiliations of visitors if known.]
Facilitators: [Include meeting facilitator or neutral and note-taker, format as above.]

MEETING OUTCOMES

Decisions

- [List all decisions and voting outcomes (not counts) in left-aligned bullet points.]

Action Items

- [List all action items for meeting attendees as agreed upon at the meeting.]

Bin Items

- [List all to-do items discussed at meeting which have not been prioritized for completion.]

MEETING RECORD

1. [First item on the agenda] (Name of discussion leader)

[Describe discussion in full sentences, striking a balance between brevity and the inclusion of all necessary details. In general, do not attribute any statements directly to meeting attendees, and instead strive to give a broad-stroke sense of the various points of view in the room.]

2. [Second item on the agenda, and so on.] (Name of discussion leader)

- [For longer or more complex discussions, it is best to organize the records in left-aligned bullet-point form, as shown here.]

- [Shorter discussion summaries should be formatted as a single paragraph—see above under #1.]

Meeting adjourned at [time].