Taking Good Meeting Notes

Very few organizations have clear protocols for meeting notes, much less any kind of orientation/training process for volunteers (or staff) who will be taking meeting notes. Since having good meeting notes (a) makes our work easier and (b) in many cases meeting notes are legal documents, building the capacity of organizations to do this job well seems important. This handout provides some useful practices.

The Question of Consistency: Before I jump in, I want to address a question that often comes up: How important is it for meeting notes to be consistent from one meeting to the next if you are rotating note-takers? Everybody's style of note taking will be a bit different, and that is fine, but every set of notes should meet a clear, minimum requirement for clarity, readability, scannability, and covering the material you want covered. Beyond that, especially if the meeting notes in question are a legal document (board minutes, for example), or something you are going to want to go back to regularly to check decisions or find other kinds of information, there is a lot to be said for having some uniformity in how the material is presented. This does not mean there cannot be room for individual style, and how important uniformity of format and level of note-taking are will vary by organization. The most important thing is to be clear about what you are expecting.

Practices I Suggest

1. **Set clear expectations for what should be covered.**
    There are many different sets of expectations you could set for what the notes will cover. Here are the basic choices (there are lots of shades of grey and variations possible):

    a. Just the topics, any decisions made (including things like "we are tabling this until x" or "we are deciding to just circle back to this sometime later, when z and w are clearer"), and commitments made/actions delegated

    b. All of the above plus a summary of key points made, to help someone reading the minutes get a basic sense of what was discussed

    c. All of what's in "a." plus a fairly detailed capturing of the discussion (might actually show who said what, or might just show more clearly the back and forth process by which the decisions – if there were any – got made)

    d. Actual, or close to, verbatim transcription of all or part of the meeting (generally requires a recording to transcribe from after the fact, unless you have an expert sitting in the room focused on this task)

It is best to **have a basic protocol to use as the default**, and then to let people know clearly if some other level of expectation is needed for a particular meeting, or section of a meeting.

If you want notes on the level of c above, it is important to have someone assigned to take minutes who does not have other responsibilities in the meeting and is not vested in participating, since their focus will need to be on the note-taking. The first two levels above can be done by people who are also participating, if they are clear about the expectations, and have done some practicing.

2.   **Be clear about the audience.**
I often see notes that are comprehensible only if you were at the meeting. This is not useful. My rule of thumb is to think about whether the notes would give someone who is familiar with the organization but was not at that meeting what they need to be able to move forward. Alternately, you can think "If I have to go back 5 years from now and try to figure out what we did at this meeting, could I do it from these notes alone?"

3.   **Use the agenda to take notes on.**
This seems common sense to me, but is a technique I don't see used often. As a note-taker, you should have a modifiable version of the agenda as your starting place; this way you'll already have the headers and whatever info the agenda provides about the subject. You may need to do a little reformatting, but it saves time and, if it is a well-designed agenda,[1] encourages you to not skip some of the details that will be useful later (who presented, what the group was being asked to do, etc.).

4.   **Make it easy to scan.**
Think about how you might use these notes; how easy will it be to go back and figure out what the group decided about item x "sometime last spring"?

   a. Leave white space – don't focus on getting it all on one page; it needs to be easy to read, not short.

   b. Use lots of formatting – headers and subheaders, bold, italics, underlining, indentations. The idea is to make it easy to pick out topics, names, assignments, etc. (It's generally best to avoid using color, since not everyone has a color printer.)

   c. Use formatting that is consistent from one set of notes to the next wherever possible – for example, you might have a protocol that says decisions are labeled with the word DECISION in all caps, followed by a colon.

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[1] See my handout, Meeting Agenda Template and Tips, for information on creating good agendas.

5. **Include appendices and/or clear references to related documents.**
Again, the goal is to be able to look at a set of notes and be able to (a) tell what happened at that meeting and (b) build on those discussions, decisions, and assignments to get real work done. Meeting notes should be kept in a notebook and/or on-line folder that also contains the meeting agenda and all materials sent out beforehand or handed out at the meeting. The notes should clearly refer to the documents people were using as discussions/ decisions were happening, so that a reader will easily be able to both identify which document they need and find it. Sometimes, with short things (proposals, specific text to be considered), it is easiest to paste the text referred to into the notes themselves, but more often it is best to just make sure your references are clear and the documents are available in the same location as the notes.

Training New Note Takers

We generally behave as if we believe that note taking is something people can just "pick up" by being in meetings. However, the huge variations in the quality of meeting notes says otherwise. Here are some ways to help people learn this important skill:

1. Give them written protocols that articulate the group's expectations, and have samples of what sort of formatting you like.

2. Walk them through examples of good and bad meeting notes and talk about not just the how, but the why – What are we trying to accomplish? What is important about that?

3. Pair them with someone who is good at it. Have both folks take notes during the meeting. Have the new person write up theirs and then sit down with the more experienced person to review them. Again, the conversation should include both the "hows" of creating good/useful meeting notes, and the "why/what" (see 2).

4. Continue that kind of pairing/editing process for several meetings, until the person in the learning role is feeling comfortable. Or, if you really want to up the quality of your notes, give anyone taking notes a buddy for that meeting, who will review the notes before they go out to everyone and make corrections and suggestions. (Generally the person doing the mentoring gets better at note-taking through this process too.)

Ask for Input: One final suggestion about creating good meeting notes: in your meeting evaluation processes, ask periodically "what would make our meeting notes more useful?" and see what suggestions pop up.