



Tips for Effectively Taking Minutes

Taking minutes is a key role at any meeting. But this function is often taken for granted. Since meeting minutes can play a key legal function, it is important to take them correctly.

Before the Meeting

1. Plan to keep minutes at any meeting where people vote. However, at committee meetings where there is no voting, you might still choose to keep minutes for your records.
2. Plan to have a notebook and pencil or laptop with you.
3. Review the minutes from the last meeting. They will be useful as you prepare the agenda.
4. Create an agenda for your upcoming meeting. If you do not normally create an agenda, you should. An agenda will:
 - a. Make the meeting more orderly.
 - b. Let attendees know what to expect at the meeting.
 - c. Make taking minutes significantly easier.

At the Start of the Meeting

1. It is a good idea to sit as close as possible to the chair of the meeting. This will allow you to hear everything and to ask for clarification without having to raise your voice.
2. List where the meeting takes place along with the date and time it starts.
3. List the number of attendees at the meeting. List an approximate number if the group is large.
4. Identify whether a quorum is present at the meeting. Refer to Robert's Rules of Order for guidance in this area.
5. Read or review the agenda if you use one. This will focus attendees on the topics and the timeframes.
6. Read the draft minutes from the previous meeting if your meeting is formal. Refer to Robert's Rules of Order for guidance in this area.

During the Meeting

NOTE: For more formal meetings involving motions, refer to Robert's Rules of Order for guidance.

1. Be concise. It is not necessary to write every word or be lengthy in the minutes/notes. Just record specific motions, vote outcomes, and key business.
2. Do not provide extensive details about a debate over an issue. Just record the facts. Minutes should record what is *done* at meetings, not what is *said*.
3. Record all motions and the outcome of votes. Do not list the vote count. The outcome is enough.
4. Do ask for clarification during the meeting if necessary. It is important that your minutes be correct. So ask, if you need to, before the discussion moves to another topic.
5. Listen to the other reports. The treasurer or some sub-committees may have news and updates to report. Make sure you obtain a copy of their updates at the end of the meeting. Record who read them in your meeting notes. Explain what happened if motions involving acceptance were involved.
6. Record any old business or action items remaining from previous meetings. Did someone need to write a letter? Was it sent? Note anything that was done or not done and by whom.
7. Record new business or action items. Note anything that needs to be done and by whom.
8. Note what time the meeting adjourned.

After the Meeting

1. Make sure you have everything you need after the meeting adjourns, such as:
 - a. Sign-In sheets so you will know who attended.
 - b. Types of reports/materials distributed so you will know what attendees received.
2. Type up the meeting minutes as soon as possible. That way you will have greater recall of what occurred.