

# HOW TO TAKE MINUTES



**There are several ways to take minutes and each organization needs to choose the appropriate method for them.** A reasonable option is to record summary of debates, agreements and disagreements with a succinct explanation of the character for each. The second method is to take action minutes when decisions are reached and responsibilities are assigned. In either of these cases, make note of the following:

- The names of the people proposing any action, stating an option or making a motion
- Take down **word-for-word** any motions, resolutions, amendments, decisions or conclusions
- Who seconded the motion
- Whether the motion is approved, defeated, or withdrawn
- What assignments were made and to whom

It is very helpful for both minute taking and for those attending the meeting if either the chair or the secretary restates a motion prior to a vote and then summarizes the decisions that are reached. The summarizer should be most careful in clarifying any point of controversy.



It is the secretary's responsibility to signal the president or chairperson to ask questions regarding the subject or discussion if he or she becomes lost or unsure. A secretary should not wait until the meeting has been adjourned to get clarification; individuals may lose their perspective, issues may become less important, or one's memory may alter what actually occurred.


Immediately after the meeting, the secretary must go over the notes while everything is still fresh, ensuring they check their notes for the following:

- Type of meeting
- Date, time, and place
- List of attendees and those absent

- Time of call to order
- Approval and/or amendments to previous meeting minutes
- Record of reports from standing and special committees
- General matters
- Record of proposals, resolutions, motions, seconding, any final disposition, and a summary of the discussion; also a record of vote
- Time of adjournment
- Nomination of submission and transcriber's name

Once the minutes have been transcribed into draft form, they should be submitted to the president or chairperson for review and/or correction. Finally, once they are returned, they need to be prepared in a formal draft, preferably agreed upon before hand, for final approval at the next meeting. Minutes should be sent out to all members within 3 to 4 days of the meeting. This allows members time to read the minutes for accuracy before the next meeting and while the previous meeting is still fresh in their minds.

## Tips While You're Taking Minutes

- It is a good idea to sit as close as possible to the chair of the meeting as this will allow you to hear everything and to ask for clarification without having to raise your voice.
  - Make note not only of the concerns, but also of any accomplishments discussed in the meeting.
  - Write things as they happen. For example, if someone said something about one subject, then you moved on to another issue, but something else happened about the first subject, don't group them together.
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- Make sure you have the correct name spellings, contact email addresses and telephone numbers.
  - Remember, minutes are very important. They are saved and might be referred to for years and years to come. If it is a legal matter, someone's reputation may depend on it.
  - Remember, even though you are taking notes, you may still participate in the debates.
  - Have people write down their motions so their ideas are not misinterpreted.
- Read certain parts of Robert's Rules of Order, such as the section on being a secretary.
  - Consider learning shorthand or using a laptop to take the minutes.



### Warnings

- Don't give yourself too much work by putting too much detail in the minutes.
- Don't be afraid to interrupt and ask for clarification.
- Try and send out copies of the minutes as soon as possible.
- Type up your draft as soon as possible.

### Check that your minutes

- provide a true, impartial and balanced account of the proceedings;
- are written in clear, concise and unambiguous language;
- are as concise as is compatible with the degree of accuracy required;
- follow a method of presentation which helps the reader assimilate the contents.



### Once the minutes have been drafted

- Ask the chairperson to check them.
- Circulate the minutes to anyone who will be expected to act upon them. It is a good idea to clearly identify these people by putting their names in an “action” column on the right of the page and opposite the appropriate references in the text.



- If someone asks for a correction, try to negotiate an acceptable form of words. However, do not be fooled by people who want you to report what they *should* have said, not what they *actually* said.

- At the following meeting these minutes will be discussed and any arguments over them will be resolved.
- The chairperson will then sign them as correct.
- Keep these minutes filed in a safe place.

