
Minute writing: a training guide

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Taking the minutes of a meeting

In the course of our working lives, all of us will, at some point, attend a meeting at which minutes are produced. The purpose of minutes is to provide a permanent, and publicly-accessible, record of the business transacted at a meeting. Simply put, they are notes of decisions made, and a record of who is going to implement those decisions. For those unable to attend a meeting, they provide a summary of the discussions which took place, the decisions which were reached, and the actions which are to be taken as a consequence of decisions reached at the meeting. Minutes summarise the key points of a meeting and ensure accurate representation of the discussions that took place. Their key features are their objective and neutral tone, and the breadth of the information they provide: they record all discussions, placing emphasis on no particular discussion or point.

This guide is intended to aid those who write the minutes for meetings. It covers all aspects of producing minutes, from taking notes and structuring minutes, to the style and language expected in this type of document.

Definition

The dictionary definitions of 'minutes' are:

- The official written record of what is said at a formal meeting;
- A written note or statement sent to a colleague; a memorandum.
Chambers 21st Century Dictionary

- A short note or memorandum.
Collins English Dictionary

Where a *memorandum* is,

- A written statement or record, especially one circulated for the attention of colleagues at work;
- A note of something to be remembered.
*(From Latin *memorare*, meaning 'a thing to be remembered'.)*
Collins English Dictionary

Minutes are the official record of what passed at a formal meeting where each item ('minute') is a short note intended to remind readers of a decision that was reached, and the actions that should be taken as a consequence.

Purpose

As with all types of documents, understanding the purpose of minutes will help you in writing and interpreting them. Minutes have a range of purposes both formal and functional. They can be taken for any meeting ranging from brief team meetings to formal senior committee and board meetings, and their purpose and the style in which they are written can vary. As with all communications however, the nature and style will be determined largely by the likely audience and their shelf life.

Before considering style and audience, let's look at the key purpose of all minutes, which is to provide a **public 'memory'** for an organisation or group.

Permanent record

Most organisations are structured entities that operate under set, explicit procedures and regulations. Private corporations, which are more than the sum of individuals working within them, must account for their governance and decision-making to the shareholders who fund them. Public bodies have a similar duty of transparency: they operate within a regulatory framework which is set in place by the government. As universities are subject to external scrutiny by a number of organisations (such as HEFCE, QAA and professional bodies), minutes provide important evidence of the quality and standards of our work.

Universities are regulated corporate bodies and as such, governance is through set procedures that are publicly known and reviewed. Minutes provide a permanent record of the University's business and decision-making. In this sense, they are the memory and history of the University. And as open and public documents, they are available to anyone who wants to know what decisions were taken, when, why and how.

Decisions

One of the easiest ways to recognise minutes is by their focus on decision-making. We take minutes primarily to record and monitor decisions and activities. As an historical record, minutes are concerned with decisions resulting in actions: they provide details on what decisions were made, when, and for what reason.

In this sense, minutes reflect a democratic decision-making structure. If decisions were taken autocratically, there would be no need for a record as there would be no principle of accountability. Within the University, decisions are taken by committees following informed discussion. Consultation and debate is reflected through committee and board minutes.

Actions

Most decisions result in some kind of action. Action points are matters for named individuals or departments to take forward and usually result in change of some kind. Minutes provide a useful reminder to those who agreed to take responsibility for an action point. By following the decisions taken, and the action which is to be taken as a result, you can trace the slow evolution and response of the organisation to internal dialogue and debate.

Disseminating information

As the public memory of an organisation, minutes are also the way in which decisions are disseminated. As with participation in any democratic structure, it would be impossible for everyone in an organisation to attend a meeting. Minutes are the way in which people are kept informed of changes and debates.

When someone is unable to attend a meeting, minutes are invaluable: they ensure everyone is able to contribute equally at the next meeting by providing details of what passed at the previous meeting. Considered across a longer length of time, minutes therefore allow an organisation to build on what has gone before.

Style: types of minutes

How you write your minutes should be determined by how they will be used. If your audience is a board or committee, or if the minutes are likely to be used by an external audience, they are likely to be more formal, and to include more contextual information, than minutes produced for a team meeting.

Considering your audience helps you determine not only what style to write your minutes in, but also how detailed they should be.

Minutes can be informal or formal depending on their **purpose** and **audience**.

Action minutes

Small internal groups, such as teams or project groups, which meet on a regular basis, are likely to produce minutes that emphasise action points without worrying about keeping a detailed account of how or why decisions were made. The purpose of these minutes is to provide a record of decisions that require action. In this instance, brief notes with lists of action points might be all that is required. As the audience is internal, the style might be informal with action points listed in a table, and discussion and decisions noted as bullet points.

Often, the minute-taker will be a member of the team or group, and is free to participate in the discussion.

Discursive minutes

Formal committee and board meetings that may have an external audience, and that are used to provide an historical record and to disseminate information, are likely to be drafted in a more formal way. Here, discussions and decisions are recorded in paragraphs of full text with full sentences. Usually, decisions are recorded as having been taken by the committee, or by the members. It is rare to name individuals in formal minutes. Formal minutes are often accompanied by papers which inform the discussion by the board/ committee.

The minute-taker in this scenario is usually a formally appointed secretary. The secretary has a range of tasks which includes assisting in setting the agenda; calling for, collating and distributing papers; following up on action points; and providing briefings to the Chair. The secretary is not expected to contribute to the discussions, leaving him/ her free to accurately and faithfully describe what passed at the meeting without bias or distraction.

Verbatim minutes

Occasionally, it may be appropriate to produce verbatim minutes. These offer a word-for-word account and are used where there is a dispute of some nature. The minute-taker is expected to record what was said by all parties. All statements are directly attributed to a named individual. Verbatim minutes are used to capture what passed at disciplinary panels or panels which consider student complaints and appeals. As with discursive minutes, the minute-taker is not expected to contribute as this may compromise their role as an independent and objective observer of all that passed.

Taking notes

The key skill that a minute-taker needs is the ability to record the message, not the words.

Minutes are not a record of what was said. They are a record of what was discussed.

Gutmann (Taking Minutes of Meetings)

Taking notes of a meeting is arguably the most difficult part of producing minutes. The experience varies depending on the nature of the meeting, the number of members/ participants and their relationship with one another, and how good the Chair is at directing discussion and summing up. However taking notes is greatly assisted by understanding the purpose of the meeting, preparing for the meeting by familiarising yourself with the agenda and other documents circulated in advance, and by bearing the structure of minutes in mind. Taking notes is not about writing fast. It is about mentally summarising discussions and distilling the essence of the conversation.

What to include

Once again, understanding the purpose of minutes will help you decide what to take note of at a meeting. Minutes record the discussions which result in **decisions** and **actions**. In addition, they provide information to people who wish to understand the business of the meeting but were unable to attend it. Noting some contextual information is therefore important to making decisions and action points comprehensible, but it can often be limited to a sentence.

Generally, discussion of a particular item will open with an explanation of the item, followed by discussion by participants/ members, and finally a decision. If a paper is available on the issue that is being discussed, you can usually use this to gather background/ contextual information. This leaves you free to focus on the discussion leading to a decision. If you are struggling with lengthy, complicated conversation and an overload of information, you may find concentrating on the 5 W's and H helps you in focussing your attention:

- **What** was decided?
- **Why** was the decision taken?
- **Who** is going to carry out the action points related to the decision?
- **When** must the action points be completed (what is the deadline)?
- *(Where is generally not an important focus for minutes).*
- **How** was the decision reached and how will it be implemented?

As minutes are objective, neutral documents, they should not convey emotion. Their purpose is to capture decisions taken, rather than focussing on the minutiae of the discussion. Even if a row breaks out and participants are shouting at each other across the table, the minutes will merely note that the discussion was lengthy or well-reasoned. As verbatim conversations are rarely recorded, minutes are generally much shorter and briefer than the original meeting or discussion.

The structure of discussion at a meeting

When taking notes of a discussion, begin with the initial explanatory report. This might be a paper providing information on the item under discussion, or it may be a brief oral explanation by a member. You should note enough facts and information to provide the context for the item. When considering how much information to provide, ask yourself, if someone were unable to attend this meeting, but wished to contribute to an ongoing discussion at the next meeting, would the information I provide give them enough background to participate on an equal footing?

Once you have provided a contextual explanation of the item being discussed, note the key opinions and views that were expressed. Discussions can be lengthy, contradictory and fast-moving so rather than trying to note what every person says about an issue, try **listening actively**. This is a skill that we use every day in normal conversation. Active listening involves following the conversation while simultaneously maintaining a mental summary of what has already been said. If you listen actively, you should be able to capture the key points of the discussion without having to provide a verbatim account of the entire interchange.

Finally, make a note of the outcome of the discussion. Was the proposal agreed or did the committee decide that it needed further information before reaching a decision? Are any named members required to do something as a result of a decision taken? If so, this should be noted as an action point.

Tips for note-taking

Your notes are purely for your own use. There is no standard or convention that you need follow in taking notes and whatever works best for you, is acceptable. The goal is to produce an accurate and comprehensive record of the meeting so your notes should be brief and clear with just enough detail to identify the main points and jog your memory when you begin writing the minutes. How to capture information for that purpose is entirely up to you. The following tips are offered as suggestions:

- Make an **attendance sheet** prior to the meeting and circulate it, asking everyone present to sign the sheet. With large meetings, or meetings where you don't recognise everyone, this will make it much easier to see who was present at the meeting. It also means you won't have to spend the first few minutes of the meeting taking down the names of those present.
- Create an inch-wide column to the side of your page where you can record **action points**. This will help focus your attention on discussion leading to decisions and actions. Make sure you note who is expected to take action on the decision. If you are unsure, ask the Chair to clarify this for you.
- Organise your notes under **headings**. The structure of your minutes is determined by the agenda so noting discussions under the headings provided by agenda items will help you follow the conversation, and will also save you a lot of time when it comes to writing up your notes and structuring your minutes. Leave a bit of space at the end of your notes for each section in case members return to a particular item later in the meeting and you need to add further notes.
- Note each **new idea** with a mark such as an arrow or bullet point. This will help you separate out the strands of the discussion when you write up your notes.

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- Write down the **paragraph** and **paper numbers** that people refer to. This will help jog your memory when it comes to writing up your notes.
 - Use **short-hand**. Keep your notes brief by using abbreviations. Never use a sentence where a phrase will suffice. Write in bullet point lists: this captures essentials and also makes your notes easier to read and transcribe into minutes.
 - Keep a **spare pen** with you.
 - If you are having trouble following a conversation, try noting down key points in **list form**, or consider taking notes in the form of a **spider diagram** or **mind map**. This will help you separate fact from opinion, ensuring that your minutes are objective and verifiable.
 - Be **selective** in your note-taking. If you find your notes are becoming too long, try actively listening for the conclusions and decisions reached. In listening for decisions, your attention becomes focussed on facts and outcomes, rather than opinion. This is especially helpful where long discussions over contentious issues degenerate into argument.
 - If you are unclear what decision has been taken, make a note of this and **clarify it with the Chair**.

Producing minutes

Using your notes

When looking at taking notes, we saw that it is not necessary to write everything down. Similarly, with writing up minutes, you will rarely use all your notes. So how do you decide what to include?

A good rule of thumb is to include enough information that someone who was not present at the meeting will be able to follow the discussion as recorded in the minutes. Introduce each minute with an explanation of what was being discussed. When recording the flow of the conversation, include the main points that were raised and any major disagreements. Finally, note the decision that was reached and any action points that result from this decision.

With the exception of decisions and action points which should always be recorded, if you are in doubt about whether to include something, you can probably leave it out. Why? Because if you are even wondering whether to include it, chances are it was neither a main point, nor essential to providing contextual information. Minutes are produced for an audience so ask yourself, 'do they really need to know this?'

Some writers may find it useful to structure their notes into a different form before trying to write up a first draft of the minutes. One way that may prove useful in focussing your attention and distilling your notes to the essential information needed, is to organise them into a spider diagram or mind-map. Write your subject in the middle of the page and draw lines branching out from it. By linking main points to each other, you create a skeleton of the discussion which focuses on essential information only.

Writing up

Try to write up your first draft as soon after the meeting as possible. While your notes may be a good guide to what passed, the sooner you write them up, the more you can rely on

your memory of the tone of the discussion. This will make your minutes a more accurate record of what passed.

Save yourself time by creating templates. This is especially useful where the meeting is a recurring one, or where there is a house or department style. If there are standing items on your agenda, insert these into the master document as headings.

Working from the template, create headings for the non-standard items on your agenda. Once you have the layout of your document, read through your notes identifying decisions and action points. Identifying the actions and creating the action point list before writing the minutes, can help you identify which observations and notes are relevant, and which can be discarded.

Once the minutes are drafted, send them to the Chair who will check through them for you. If there was a point which you were unsure about, include a note to the Chair asking her/ him to clarify. Following approval by the Chair, the minutes can be distributed to those who attended the meeting, and those who are expected to act upon them. To keep track of the action points, it is useful to attach an **action point list** to the front of the minutes you circulate on which the action point is identified by its corresponding minute number, together with the person who is expected to take action, and the deadline date.

Occasionally people will ask you to make a correction to the minutes. Make a note of the correction and include it in the Chair's briefing note for the following meeting. Amendments should only be made following a review of the minutes at the following meeting where members have an opportunity to clarify points made at the previous meeting. Minutes are a public record and are intended to accurately reflect what passed at a particular meeting. Where amendments are made, members should be given the opportunity to comment on changes, while the changes should be noted in the minutes of the next meeting. Minutes are only officially signed off as an accurate record of the meeting once they have been reviewed and agreed as accurate.

Style: language and grammar

The key purpose of minutes is to communicate clearly and objectively. By writing in an engaging and accessible way, it is easier for your reader to understand what you are trying to convey. Keep your sentences short and crisp, using simple words where possible. Just because you are writing a formal document, there is no need to be pompous or verbose. Aim to make your communications interesting to read, and easy to follow. Writing in a simple style, and capturing the meaning in as few words as possible without sacrificing accuracy, is a skill that is developed with time and experience.

Tense

Minutes should be written in the **past tense**. As they are a record of a discussion that has taken place, they always refer to an event in the past:

- It was **noted** that
- The Chair **reported**
- The Committee **agreed** that it **would**
- Members noted that the papers **could be viewed**

Active v. passive voice

- **Active** voice: the subject performs the action of the verb.
Members noted that the papers could be viewed on the shared drive.
- **Passive** voice: the subject receives the action of the verb.
It was noted by the members that the papers could be viewed on the shared drive.

You will notice that the passive voice is longer and more cumbersome. There is a strong temptation, when taking minutes, to report everything in the passive voice. This is particularly the case when you don't know the identities of everyone around the table, or where perhaps you don't wish to attribute a statement to a particular individual. This is because the passive voice allows you to eliminate the agent. For instance: *It was noted that the papers could be viewed on the shared drive.*

Writing in the passive voice makes it easy to appear objective and distant, and can be useful for establishing an impersonal tone, however there are problems with relying too heavily on the passive voice. Too many passive clauses result in dense and monotonous writing. They also encourage poor writing habits: we may be tempted to move from simply implying the agent of the sentence, to failing to identify the agent at all. If you cannot identify the agent, you don't, at a technical level, have a sentence; you merely have a clause. And minutes which consist of pages of agent-less clauses can be both difficult to read and to understand. It may seem pedantic to pay so much attention to a grammatical distinction, but it is essential to communicating clearly (as we will see in the next section).

One way of limiting over-use of the passive voice is by sub-consciously completing all sentences where the agent is not explicitly stated. Ask yourself **who** performed the action. If you cannot turn your passive clause into a whole sentence, it will be impossible to attribute a decision or to identify who is supposed to act upon it. The purpose of minutes is to record decisions and action points so if these cannot be attributed, it is likely that your minutes do not make sense.

To keep your minutes interesting and engaging, use a mixture of active and passive voice. Using the active voice gives a sense of energy and momentum. By writing in the active voice, you do not need to sacrifice neutrality or objectivity as this is established by the point of view.

Point of view

Minutes represent the views of the group as a whole, rather than the recollections and opinions of the writer, or the statements of individual members. As the writer of the minutes, you need to distance yourself from what you are writing to indicate neutrality and objectivity. To do this, write in the **third person**. By establishing a consistent point of view, the integrity of the overall piece of writing is maintained.

This brings us back to the importance of identifying the agent of the sentence. The point of view is always that of the agent (i.e. the committee, members, the panel, the Chair etc). When the agent of the sentence is clearly indicated, there is no confusion over who 'owns' an opinion, decision or action. By identifying the agent, you distance yourself from what is being recorded and establish it as a matter of fact which is independently verifiable, as

opposed to an opinion based on personal observations and views. Consider the implied agent in the following clauses:

- The report would be published shortly.
- Work on targets was progressing well.
- This would streamline the process.

A more objective and neutral tone is conveyed in these sentences:

- The Chair stated that the report would be published shortly.
- It was noted that work on targets was progressing well.
- It was anticipated that this would streamline the process.

The importance of the grammatical distinction between sentences and clauses becomes clearer here. While the agent is still implied in two of the sentences, it is much easier to identify that agent where not explicitly mentioned. This establishes the objective point of view of the minute.

- It was noted [by the committee] that work on targets was progressing well.
- It was anticipated [by the members] that this would streamline the process.

To ensure that your point of view is objective and consistent, sub-consciously insert the agent into all passive voice sentences. If your sentence does not make sense, rewrite it and explicitly state the agent.

Secretary's note

Occasionally it is necessary to clarify a minute to prevent misleading a reader. A secretary's note is inserted at the end of a particular minute to provide additional factual information or refer to a change which occurred soon after the meeting.

Secretary's notes usually appear in italics and can be enclosed in square brackets:
[Secretary's note: xxxxxxx.]

Structuring minutes

As with any piece of writing, it is important to structure your minutes to make them coherent and ensure that they flow. Structuring your minutes will not be difficult: as minutes are a conventional type of document, there is a standard structure with certain items that are expected regardless of the type of minutes you are writing.

The structure of minutes is provided by the agenda which provides an outline of what will be discussed and in what order. Regardless of when an item was actually addressed in the meeting, the minutes should record the discussion and decisions under the appropriate item on the agenda.

The standard items of all minutes are:

- **Title:** the name of the meeting/ committee/ board;
- **Meeting details:** date, location and time;

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- List of all those **present**: members of the committee or board who attended the meeting;
 - List of those **in attendance**: additional people who attended the meeting on a single occasion, or who are not official members of the committee. The minute-taker appears in this section;
 - List of **apologies** received from those who were invited to attend, but were unable to do so; anyone who was expected but did not attend or send apologies is listed as **absent**;
 - **Minutes of the previous meeting**: these will be read at the meeting where members will either agree that they were a true record of the previous meeting, or they will note corrections to be made to the minutes;
 - Statements of the **business of the meeting**. This might include:
 - Matters arising: confirmation that action points from the previous meeting have been completed,
 - Chair's business/ report by the Chair,
 - Summaries of reports, discussions, or papers: reports are for information only whereas papers are for comment and discussion,
 - Announcements,
 - Proposals,
 - Minutes of reporting committees,
 - Circulation of information;
 - Any other business: this covers discussion of items that were not listed on the agenda;
 - Date of next meeting (with time and location if appropriate).

Numbering

The minutes of a meeting consist of individual items, each of which receives a single minute. When referring to a single point, we refer to a minute, that is, a short note or memorandum. Minutes are therefore a composite of short notes.

To make it possible for individual minutes to be referenced and identified, each item should be given a number. What kind of progressive numbering system you use will very much depend on the audience of your minutes and their shelf life. The standing committees at the University, which hold minutes indefinitely as a form of official and permanent documentary record, use a sequential continuous numbering convention (the second of the two options below):

- **By meeting**: numbering is started afresh for each new meeting and the actual meeting is referenced by date and name. For instance, *Minute 3, 12 Feb 2009* refers.
- **Continuous**: numbering of minutes is from 1 to infinity and minute numbers for the latest meeting run on from the previous meeting. For instance, *Minute 1045* refers.

More informal minutes, such as those of team meetings or small project groups, are likely to number minutes by meeting rather than using the running-on convention. Minute numbers which run on from the previous meeting are particularly useful where minutes from previous meetings are frequently referred to.

Resources

For examples of minutes that are taken at University committee meetings, visit the Committee's page on staffcentral: <http://staffcentral.brighton.ac.uk/committees/>. The minutes for all committee meetings can be found by selecting the Committee name in the structure chart.

Advice on producing minutes can be found on various internet sites free of charge:

- <http://www.howtobooks.co.uk/business/reports/taking-minutes.asp>
- <http://www.bdcvs.org.uk/documents/governance%20toolkit/taking%20minutes.pdf>

Joanna Gutmann's *Taking Minutes of Meetings* is a very comprehensive and easy-to-use guide on all aspects of minute-taking. The book is published by Kogan Page (London), 2007.