

GUIDE TO TAKING NOTES AND PREPARING MEETING SUMMARIES
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1. Overview and Intended Use of this Document

Taking notes is one of the most common assignments at the Center for Collaborative Policy, and can be viewed as one of the most time-consuming and tiresome. It requires critical synthesis of hours of rapid, complex conversation, and a persistent attention to detail. At the same time, note-taking is an essential skill that provides a foundation for a practitioner to begin facilitating dialogue dialogue. It teaches a practitioner how to listen, how to distill comments, and how to reframe comments with vocabulary that honors a concern yet takes off any potentially aggressive or offensive edge. Meeting summaries are also the most common

product of the Center. They are read or reviewed by numerous stakeholders, and often serve as a public record. Their quality, including their accuracy and accessibility, reflects the professionalism of the Center’s practitioners, and should be taken seriously.

There is no single right way to take notes and write meeting summaries, and each practitioner will have a slightly different style. Nonetheless, this document outlines key principles and approaches for a new practitioner to keep in mind as they develop this skill. It discusses how to prepare for taking notes at a meeting, what to do when actually taking notes, and what to do after a meeting, including discussion of the content, style, and structure of notes.

2. Preparing to Take Notes

This section explains three main steps for preparing yourself.

A. Clarify the Intended Use of the Notes

Before doing anything you need to be able to answer, Who is the intended audience? How will they use this document? How long are they likely to spend reviewing it?

For example, are they high-powered executives with numerous support staff in the room, and only need a checklist of items? Are they professionals who will work offline, and need a reminder about what passages to revise and the associated concerns? Are they members of the public, who want to see their comments documented? Are they likely to spend less than five minutes looking at the document, or is this something they reference throughout a meeting and go back to regularly?

The answer to these questions help you determine what level of detail is needed (2-B below), and how much time you should spend completing the summary.

B. Clarify the Level of Detail

Once you’ve thought about the intended use of the notes, you can ascertain the appropriate level of detail. This is something you will need to affirm with your client and the stakeholders before taking notes and preparing a document.

A general rule of thumb is to imagine a stakeholder who missed the meeting – what would they need to know? Starting from this principle, one can think heuristically about three levels of notes:

1. Low-level: these have a lot of details. They are not a transcript – we never claim to provide minutes or a transcript – but are “in the weeds” and provide a play-by-play of negotiation points and comments by participants, and often attribute statements. These are rarely required.
2. Mid-level: these have fewer details but definitely capture key topics, issues, and concerns discussed by the group. These are very common.

3. High-level: these are limited to action items, decisions, and agreements. These are common.

It is critical to note: lower-level notes still include what would be found in higher-level notes. So mid-level notes will capture key topics as well as action items, decisions, and agreements, just like low-level notes will include all this information plus more subtle details.

C. Review the Content

Rather than going in cold with no anticipation of what will be discussed, you can get a jump on a meeting by reviewing earlier summaries and select background documents, and going over the agenda with the lead mediator. (You'll need to ask them how much time you have for background preparation before you bill.) This will help you get oriented to the tasks at hand, understand where the group is in terms of a negotiation or developing a work product, and familiarize yourself with some of the terms and concepts being discussed. This is the same thing that the lead mediator does when preparing for a new case.

It is important to clarify here: the lead mediator will not expect you to become an expert in this subject matter overnight. They will have appropriate expectations of you – they will recognize that it takes time to become familiar with the material, the stakeholders, and their style of conversation, and to track where they are in the process. After three or four meetings you are likely to feel more comfortable with the material and meeting dynamics, and see how items are coming up repeatedly and being developed over time. This will make it easier for you to take notes; the same principle will apply to your write-ups, as explained below.

3. Taking Notes

No prescription exists for how best to take notes. Instead you have some tools and options.

A. How Much Should I Capture?

In general it is better to take more detailed notes than you think you will need for the summary document, so you can provide more specificity if needed. At the same time, you do not want to make yourself so frantic and stressed by trying to capture every word that you start to make errors, miss points, and lose the ability to listen, comprehend what is being said, and follow the conversation. Generally speaking, at minimum you want to make sure that you are capturing the key issues and points, as well as all action items, decisions, and agreements.

B. Work on Your Listening

As you start developing your note-taking skill, you will need to work on your listening. This takes your ability to capture words very fast to the next level. You learn to start listening not only to the action items called out by the mediator/facilitator, but to what people are saying and what the core of their concern or comment is. It will take time to separate the wheat from the chaff, so to speak, and differentiate between what are prefatory and contextual words, and what are the key issue or central point someone is trying to make. This also operates at the level of the group – people may go around and make many side notes and references and

tangents, and while you may jot these down for comprehensiveness, you need to be track the main focus or thread of conversation. It takes time to develop this capacity, yet it is exciting work – it is, as noted in the overview, the foundation of your own ability to facilitate dialogue.

C. Laptops and Logistics

Typically note-takers use a laptop because they can type faster than they can write by hand, yet sometimes people prefer to take hand-written notes; this partly depends on the required level of detail (2-B above). It's best to start with a laptop until you become familiar with how rapidly you will need to take notes.

Logistically, make sure you bring your laptop, powercord, and a flash drive to every meeting; in some cases the lead mediator or client will ask for a copy of the raw notes after the meeting, so they can refer to these in the interim period when you are preparing the summary. As a side note, you should assume you are expected to get a digital copy of any presentations shown on-screen, for the facilitation records and posting online (the client may handle this, but not always).

D. Templates, Style, and Real-Time Writing

Some meetings will have highly structured agenda items that correspond with a worksheet or form. You may be able to save time by using this material as a template in which to enter notes during the meeting. When writing the summary you will not have to figure out where sections start and end. This may be challenging if people skip from topic to topic, but can be explored.

In terms of style, many note-takers use abbreviations, initials for people's names, and a combination of highlighting or bolding or underlining to mark things. You will have to figure out what works best for you. If you provide a copy of your raw notes to the lead mediator, or clean these up a little bit and then provide them to the client shortly after the meeting, you will need to explain to them what your short-hand and other significations mean.

Depending on the pace of the meeting, the level of detail, and their familiarity with the material, some note-takers synthesize comments in real-time and write their notes in the same language they plan to use in the summary. While they still go back and clean things up, this saves them time later.

E. Asking Questions in the Room

At first you may feel shy, but you need to quickly get over your shyness and not be afraid to ask for clarification during a meeting if you cannot hear what was said. You can either ask the mediator to do this, or you can ask the stakeholder directly (you should check with your mediator first to see if they have a preference). While this will draw attention to you and may make you embarrassed, especially if you are new to the group, it is more important to capture accurately what is said. Furthermore, this indicates that you are taking your role seriously and doing your best to serve the group – rather than writing down something that is incomplete or incoherent, or leaving a comment out entirely, you are bothering to check in and verify that you have accurately captured the comment. This will be particularly important if the group is

discussing and negotiating specific language – you want to make sure you have the agreement language properly documented.

4. Writing a Meeting Summary

When writing a meeting summary you need to keep in mind considerations about the content, style, and structure of your notes. Prior to this you need to also have clarified expectations about the process of drafting and finalizing notes.

A. General Process for Completing a Meeting Summary

When a process is just getting started and your client and/or stakeholders do not have a lot of familiarity with or trust in the Center’s meeting summaries and your skills, you may need to put extra effort into finalizing the notes. This means you might need to draft the summary, provide it to the lead mediator for internal review, and make revisions; then provide it to the client for their review, and make revisions; next provide it to the stakeholders, offer to make revisions if they believe something has been captured inaccurately or mischaracterized, and make revisions; and finally distribute it and post it for public accessibility. This is a lot of steps and laborious, although the initial draft takes longest and generally the largest number of revisions requested will come from the lead mediator, with subsequent steps going more quickly.

As you (and the lead mediator) develop familiarity and trust with a client and a group, you may be able to remove many steps of the process and go straight from draft, revisions requested by the lead mediator, to distribution and posting. This will also depend partly on the intended use of the summary; generally a more politically contentious and visible meeting will require greater review of the summary.

You should keep in mind that requests for revision from the lead mediator are not personal criticisms, and are for the benefit of everyone involved, including your professional development. There may be a lot of revisions in the first few summaries you do. If you have concerns about how they are conveying their requests, you should talk to them about what kind of mentoring works best for you.

B. Timeliness

It is best to draft the summary as soon as possible after the meeting, when details and comments and conclusions are still fresh in your mind. Waiting even a day, much less several days or more, will make it harder and more time-consuming to reconstruct the essence of the conversation (this is especially true if you’re working off of hand-written notes or have numerous abbreviations or short-hand clauses).

C. How Long Should This Take?

If you are new to a process or topic, it may be difficult and time-consuming to write the first meeting summaries. Your lead mediator will let you know the amount of time you have to complete the summary, including drafting and revisions, and you are responsible for staying within this allocation; if you are having trouble meeting it, you should let them know as soon as

you are aware of this, so they can look at what you've done and either find a way to streamline your effort or otherwise address the situation. In a new process with complex material, you may be allocated a 2:1 ratio of drafting and revising time to meeting time; so for a 4 hour meeting, you would be allocated 8 hours to draft the summary and then revise it once you have comments. This amount of time is seldom available, and more often the standard allocation will be approximately 1.5:1 of drafting and revising time to meeting time. As you gain experience with writing summaries and the content matter being discussed by the group, you should aim to reduce your writing time to 1:1 ratio. This will save you time that you can apply to other tasks for the process, and let you develop other skills. Of course, quality should not be sacrificed for speed, and these times are suggested as general guides.

D. Content: Sequencing of the Summary

Generally you will follow the agenda items, so that people who were in the meeting or who have the agenda in hand can readily find a section of notes. Structurally, you should always include a table of contents for any summary more than two or three pages long (many more details on structure are in section 4-M, N, and O below).

An important consideration is how to make the notes most accessible. In some cases, for example, the agenda may skip from a review of Section 7.8 to 7.14 back to 7.9 and 7.10 of a document; this may be done because the time constraints of a particular participant, or the breaks in the day and time needed for different items. In the meeting summary, it probably makes the most sense to rearrange the notes to go in numerical order, even though in the actual meeting the sections were handled out of order.

Similarly, within a particular agenda item, you probably want to group comments that are on the same topic, even if in the meeting these come at different times. These could be combined under a sub-heading or paragraph. If the same topic is discussed under different agenda items, you could make a note in each section referring the reader to the companion section for more discussion on the topic.

E. Content: How Do I Handle Presentations?

Presentations can often have a lot of content that is rapidly moved through, including graphs and diagrams and lots of numbers. It is nearly impossible to accurately capture all the details of a presentation. For this reason, it is preferable to have the documents (powerpoint slides, handouts, maps, etc.) posted online or otherwise made available, and to reference the presentation materials in the meeting summary. This allows stakeholders or members of the public to consult the original document. The presentation materials are not attached to the actual summary, so long as they are readily available.

The availability of materials notwithstanding, it is important to provide a little bit of information in the meeting summary about what a presentation covered. So you should explain what the main focus of the presentation was, the types of information included, and any key messages or conclusions offered.

You also should take notes on the questions and answers, and discussion that follows a presentation, as there is no other reference for this (i.e., it will not be included in slides).

Lastly, presentation slides do not perfectly replicate exactly what a presenter said. In some cases the client or lead mediator may ask you to take detailed notes on a presentation and include these in the summary; you should proactively clarify with the lead mediator how they want to handle presentations in the meeting.

F. Content: Attribution and Naming Conventions

Typically we do not attribute comments to particular individuals. This depends on the intended use of the meeting and should be clarified with the client and/or lead mediator in advance of the meeting. Attribution is generally not needed to capture the main topics and points raised by stakeholders. In politically sensitive situations, it may make people uncomfortable and unwilling to speak what's on their mind if they know their comment will be attributed. At the same time, in some situations (like a structured negotiation) attribution may be important to clarify people's proposals and sticking points. The proper protocol for attributing comments is something that the lead mediator may need to discuss with the group, and you should clarify their expectation in advance of preparing the summary.

Regardless of attribution in the summary, you generally will want to capture what names you can during the meeting, even if you do not put these in the summary. This is in case the lead mediator and/or client needs to review a portion of the discussion – it will help to jog their memory.

If you are attributing comments, the first time someone is mentioned in the notes you should write their full name. You should also include their position (if known) and affiliation. This information should be available in the member roster. Subsequently you probably will refer to them as “Mr.” or “Ms.” In cases where it is okay for the tone of the meeting summary to be informal, you may refer to them by first name; you should nevertheless consider whether these will be used internally or for a public record.

G. Content: Pay Attention to Detail, including Final Agreements

This was mentioned in the overview: Meeting summaries are the most common product of the Center; their quality, including their accuracy and accessibility, reflects the professionalism of the Center's practitioners, and should be taken seriously. This means you need to be listening carefully and then do your best to accurately capture the comment or recommendation. Oftentimes this is nuanced, and changes to a few words may carry great significance; the same goes for numbers if a negotiation is focused on such a thing. You will get a sense of what details are important through your preparation, including advance discussions with the lead mediator about the appropriate level of detail (see section 2-B above). In the notes you will need to strike the appropriate balance between capturing key issues and points, and capturing details. It may take a few meetings to find this balance in a new project.

Along those lines, it is important to reiterate that the lead mediator will have appropriate expectations of you. It would not be reasonable to expect you capture all the details and nuances and key points of a project when you are just learning to take notes, or this is your first meeting (or first few meetings) on a new project. They will work with you to improve your listening and writing skills. You should not feel overly anxious or worried about capturing and conveying everything perfectly; it takes time to hone your ears and your pen, and there is always room for improvement. It is not uncommon for a lead mediator to review a note-taker's work even one or two years into the process (although it should be expected that the review time will decrease considerably compared with the first reviews).

If you are unsure of the meaning or accuracy of a statement, you should highlight this in yellow or some other manner so the lead mediator can quickly see what needs clarification or adjustment. Again, this is not something to be embarrassed about, and will save time.

Finally, a small but important point here is to read to the end of a section of notes and make sure that the final agreement language, decision, or action item is indeed where the group ended. A lot of times in discussion a proposal will be floated by the mediator or a stakeholder, this will gain traction and people will support it and most people will agree to it and it will sound like things are great and done – until someone else chimes in and proposes a friendly amendment. This can happen repeatedly. You want to make sure that your summary reflects where the conversation ended and the final agreement, not intermediate agreements along the way. This is one reason why writing the summary when the conversation is fresh in your mind is beneficial.

H. Content: Focus on the Substance, Not the Facilitation

It is tempting to write lots of details about the process – what the mediator said first, what they did, how they explained the exercise, etc. This is typically neither important nor of interest to the reader. Focus on the substance of what was said, not the details of the process.

I. Content: Stay True to What Was Said

Sometimes when you submit a draft summary for review to a client or to stakeholders, people will want to change or re-characterize what was said, or to add more detail that qualifies what they said. Your lead mediator will be your first resource here, and you should consult with them about any requested revisions. The two of you may not agree with the requested revision, or may feel it is warranted. At the end of the day, the meeting summary needs to accurately reflect what was said in the room. There is often room for massaging the language and adding nuance, but ultimately the lead mediator and you need to feel comfortable that the statement is still accurate, and does not distort what was actually said. If someone feels passionately that they want to add qualification or details to a statement, you can include it in the summary as a clearly marked appendix to the notes, and explain that it was submitted after the meeting.

J. Style: Pay Attention to Your Voice, including Numbers and Emotion

You will need to find the appropriate language to capture and convey a comment and sentiment, regardless of attribution. If you are not attributing comments, it will likely be through third-person language such as, “It was noted,” “It was suggested,” “It was expressed,” or “It was emphasized.” Or in a more active voice, “Members expressed concern,” “Members suggested,” or “The group suggested.”

You will need to also find the appropriate qualifiers. This applies both to numbers and emotions. Regarding numbers, we generally do not try and rigorously account for the number of stakeholders that supported or made a comment, as in a collaborative process it does not matter when one or ten people have an interest – the group as a whole must address it regardless. (In some cases, like when you are taking a straw poll, it may be helpful to note how many people supported an idea.) Nonetheless, sometimes it is helpful and important to give a sense of how much support existed for an item, or how commonly concern was expressed. Words like, “several,” “a few,” “most”, or “all” can be helpful here. You will have to judge what is appropriate, and be able to explain how you used the term (as you may get asked at some point).

In terms of emotions, one of the most important things a mediator can do is to help reframe someone’s concern in a productive way (this is something you practice in facilitation trainings). This goes along with enforcing ground rules and not letting people verbally attack each other (in other words, making sure people treat each other with respect, and acknowledge that all ideas have value, even if they do not agree with each other). The notes need to have the same tone as the mediator. So if someone is worked up about a proposal and has a lot of emotion, you do not want to disregard this, yet neither do you want to portray this in an inflammatory way. In this case you need to find language that is appropriate, and again use your judgment about what is appropriate (the mediator will look at this when they review your draft). Language like, “Strong concern,” “major concern,” “strong reservation,” “reiterated,” and “strongly emphasized,” are examples that may be useful.

K. Style: Conciseness is a Virtue

Along the same lines as focusing on the substance, you should write concisely. Try and eliminate slow wind-up sentences and excessive qualification of statements. So, for example, you could have a series of bullets that reflect a series of comments, and start of each bullet with a clause like, “It was said,” “It was noted.” Or you could start of the section by saying, “Members had a series of comments on the proposal.” Then for each bullet you cut to the chase and go right into the comment, rather than starting off with the qualifying clause.

L. Style: Write Formally and Professionally, Not Colloquially

Again, the meeting summaries are professional products. Avoid contractions, slang, or jargon. Spell out acronyms the first time you use them – do not assume that everyone has the same level of familiarity with the content being discussed. Critically, proofread your work before submitting the draft to the lead mediator.

M: Structure: Format Your Document Professionally

Make sure you have standard margins (1" on all sides unless otherwise specified by the lead mediator); use the same font consistently through the document (unless a template is provided by the lead mediator and this has different formatting; sometimes clients are picky about this); include page numbers; include an appropriate header and footer as necessary (common headers include, "Draft Document for Review," "For Internal Use Only," etc – check with your lead mediator for guidance); use tabs and bullets and numbers consistently throughout the document (i.e., do not have one set of bullets indented half an inch, and another set indented one inch; do not have numbers continue across sections unless warranted); and use consistent, clearly visible headers and sub-headers in the text (like in this document). At the same time, avoid excessive use of colors, italics, and all capital letters.

This may seem nit-picky – it is. The reason is that, again, these are common documents that reflect the organization's professionalism. You do not need to – and should not – spend undue amounts of time on formatting (base this on the intended use, section 2-A above), but you should make it your standard practice to have the document look high quality and consistent.

N: Structure: Standard Items to Include

Make sure you have the document clearly labeled at the top – the meeting name, the group name, the meeting date, time, and location. This is important for people's records, and will all be available on the agenda.

In some cases, particularly with a new process, you may need to qualify up front who prepared the notes.

If your document is more than two or three pages long, include a table of contents. If there are numerous sub-sections within a section, particularly if they are lengthy, include this level of detail within the table of contents. This is fundamental to making the document accessible.

Include a list of participants (also called "attendees"). In some cases the client may request that you also include their affiliation (again, consult the member roster). If someone arrives late or is not able to stay the entire meeting, that is okay, list their name anyway. (If precise details on who supported an agreement are needed, this information will be compiled during that agenda item and noted in that section of the summary; so if someone is not present, this will be in the record.) If the meeting is in person and someone calls in, the lead mediator may request that you denote they participated by telephone.

Include a list of action items (including who is responsible, the due date if specified, and the task) at the start of the summary, typically after the table of contents.

O: Structure: Visually Highlight Action Items and Agreements

Again thinking about accessibility, be sure to highlight, bold, and capitalize, or otherwise visually call attention to action items and agreements. Oftentimes these are embedded in the

text and can be hard for people to find. As mentioned in the preceding section, a full list of action items should then be compiled at the start of the document, for easy reference.

Enjoy the experience, prepare to facilitate!