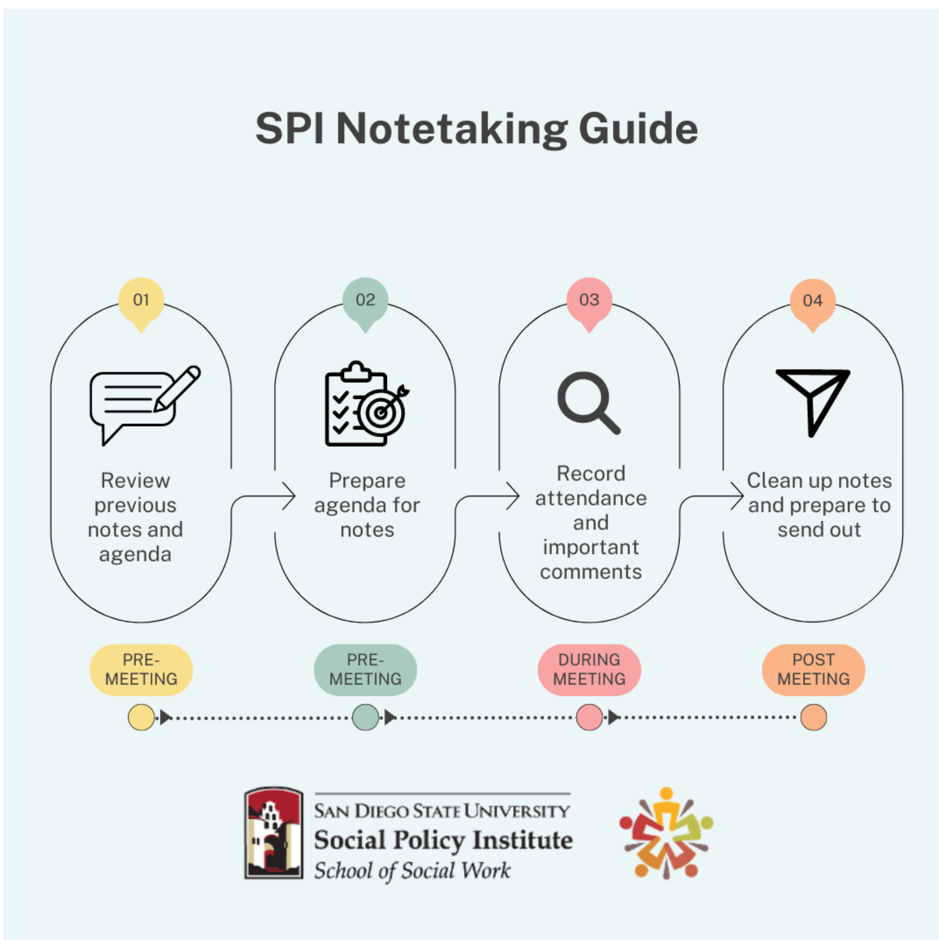
How To:
Effective Notetaking for Teams or Collaboratives

Purpose

- *WHAT* - Meeting notes should provide a summary of the meeting, succinct and readable, with action and follow-up items listed.
- *WHY* - This summary, i.e., meeting highlights, will be shared with everyone who was present at the meeting and those who were invited (or are part of a team) but couldn't attend.
- *HOW* - Generally, taking adequate notes at a meeting doesn't involve writing down every single thing participants are saying, rather filtering it and summarizing the most important parts so that an individual who did not attend the meeting can understand what was discussed.



Before the Meeting

1. Review the meeting agenda and other attachments that are sent out for the meeting you are assigned to take notes for.
    a. Ensure that you have the agenda, so you are able to use it as a template for your notetaking or to set up your notes
2. Review previous meeting notes, if available.
3. Modify/alter the meeting agenda to use it as a template for the notes so that you have it set up to your notetaking preference beforehand.

During the Meeting

1. At the start of the meeting, write everyone in attendance's name down at the top of the document, and what agency they are affiliated with.
    a. The full name/agencies of individuals is likely recorded on previous iterations of notes for that particular meeting/group
    b. List Host first, then members alpha by last name, then guests, lastly consultants and who they are affiliated with
2. Follow the agenda section by section and record comments/action items.
    a. Attempt to place names by specific comments from individuals if the comment seems important.
    b. Otherwise, names/quotes don't have to be specific.
3. Ask for clarification if a comment is unclear or if an action item needs more details.
4. Use bullet point format.
5. If the meeting is virtual, make sure to get access to copy the chat and if participants shared valuable/important resources there, then make sure to include them.
6. Collect all handouts (or links) that are shared at the meeting.

After the Meeting

1. *Review notes and clean up* what you have written.
    a. Highlight/bold important points or dates
    b. Revise for grammar/sentence structure
2. *Summarize each section* of the meeting in a sentence (if there is enough content to)
3. *Summarize action items* at the end of the notes.
4. *Prepare document to be shared.* Usually, the facilitator or whoever assigned you as notetaker will review and finalize the notes before they are shared with participants.

Additional Resources for Notetakers:
https://www.mural.co/blog/effective-meeting-notes
https://www.teamwork.com/blog/how-to-take-meeting-notes/
https://thinkinsights.net/consulting/cornell-method-great-notes/